Dear Sandy Mewies AM

Additional information to Culture and Communities Committee inquiry into “Access to cultural services”.

Thank you for the opportunity to provide additional information prior to our evidence session to the committee in October.

The following information aims to provide you with answers to the additional questions which were sent to us, and also expands on some of our answers during our evidence session.

**Cultural Duty LCO**

The WLGA responded to the consultation on the Cultural Duty LCO and broadly welcomed its proposed purpose in principle. However, we raised concerns over the difficulties which could arise from developing the duty during a time of financial constraints. We believe that those concerns remain valid. We would be happy to continue discussions with the Welsh Assembly Government and assist in developing the core principles for such a duty. However we believe that the legislative process itself should be undertaken during a more favourable economic climate. I have attached a copy of our written evidence to the consultation on the Cultural Duty LCO, which provides a more in-depth response.

We agree that the Cultural Duty should have access and participation for all as its core purpose, and that consideration should be given as to how a Measure could help achieve improved access to and participation in the arts and culture at a local level.

**Relationship with CyMAL**

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The WLGA and CyMAL have a good working relationship which is based on the following principles:

- An innovative and clear national strategy underpinned by clearly defined roles and responsibilities for all organisations involved in the sector
- A strong understanding of local authority structures and systems, particularly in terms of the need to engage with local authority political structures
- Regular meetings between CyMAL and the WLGA, CORL (Chief Leisure Officers Group) and SCL (Society of Chief Librarians)
- Regular informal and open dialogue, with opportunities to provide input at an early stage of development of policy development

**Eligibility criteria for future Lottery support**

In terms of lottery funding criteria, the WLGA believes that the current financial context raises questions about the ability of arts organisations, voluntary organisations and local authorities to provide the necessary matched funding to lottery grants.

We therefore suggest that the Arts Council of Wales, possibly in conjunction with other lottery funders, look to see whether criteria can be adapted, by decreasing or abolishing the match-funding requirement as a result of the difficulties which organisations will face over the coming years.

**Service provision for disabled people**

The WLGA has received a number of responses from local authorities which outline how they provide services for disabled people to ensure sufficient access and inclusion in the arts. Below are extracts from some of the responses we received which provides an insight into the type and range of provision which local authorities provide:

### Caerphilly County Borough Council

At Blackwood Miners’ Institute - Facilities for wheelchair users include a ramped entrance and level access. The Bar, Restaurant and Box Office are on the ground floor and there is a lift to the theatre. Disabled customers and their companion receive tickets at the reduced rate. For those with access requirements, we have limited accessible parking on request. We have one wheelchair- accessible toilet. Assistance dogs are welcome. Infra Red Hearing Loop available. BSL interpreted performances are programmed at least twice a year – look out for the logo in our brochure.
CCBC Arts Service always endeavours to choose venues for arts activity which have disabled parking, are close to public transport, have accessible toilets and wheelchair access throughout the building. It is also an advantage to use venues where there is a hearing induction loop, easy to control heating and lighting and good acoustics. In reality this may not always be possible, so occasionally ‘reasonable adjustments’ need to be made to projects to ensure people are included.

There are ongoing discussions at the moment through the Creu Cymru network about developing a consistent approach to disabled concession tickets and carer’s tickets, to ensure that professional theatres and arts centres across Wales are ensuring equal and fair access to disabled customers.

Rhondda Cynon Taf County Borough Council

All our current programme of participatory and presented arts programme activities are inclusive and open access. However we also offer targeted provision through our Arts Development initiatives. This includes working with the Council’s Disabled Children’s Services and Independent Living Services to provide opportunities for disabled people to engage with the arts. Targeted provision i.e. Making New Moves disabled dance group, is also provided through our community arts contract with the separate 3rd sector organisation - Rhondda Cynon Taff Community Arts.

We also ensure daytime provision within the theatres for older adults, some of whom will be living with disability, via the Daytime Delights programme.

Holiday and weekend arts activity provides opportunities for children and young people to engage with the arts at a number of accessible venues across the County Borough. Individual artists are engaged to deliver such participatory provision, as well as organisations such as Touch Trust and Taking Flight Theatre Company. We work with key disability organisations and arts providers e.g. Disability Arts Cymru, Learning Disability Wales, UCAN, Touch Trust, Hi jinx Theatre Company. We work with artists to develop their skills in delivering participatory arts activities for disabled children and young people.

Carer ticket deals: we offer a free carer ticket for those customers accompanying a disabled person who has purchased a ticket.

We work with local Special Schools and Independent Living Services (disabled adults).

Where possible we offer live performances, which highlight and showcase disabled actors.
Blaenau Gwent County Borough Council

All three venues in Blaenau Gwent (the Beaufort Theatre, Ebbw Vale; the Market Hall Cinema, Brynmawr; the Metropole Cultural and Conference Centre, Abertillery) have spaces for wheelchair users in the main auditorium and alternative performance spaces. The Metropole Cultural and Conference Centre has a lift that enables access to all levels of the venue, including dressing rooms and stage which allows wheelchair users and those with mobility problems to access all areas of the venue. There is a hearing loop in place in all three venues. Disabled parking spaces are available outside the three venues. Season brochures can be audio recorded for patrons requesting this service and bookings can be made online or via email for those with difficulty in hearing on the telephone.

Wrexham County Borough Council

Oriel Wrecsam: All doors are wide enough to allow access to wheelchair users. There is a disabled toilet and disabled parking immediately next to one of our building entrances. All of our facilities are on ground level with no steps to access them. There is also a chair lift to the offices upstairs should we require it for a meeting, but all meetings are scheduled on the ground floor.

Oriel Wrecsam has a hearing loop available.

We ensure that all printed signage and material is legible (printed to a good font size in a simple font in a dark ink onto pale background - white/cream or white ink onto dark background). We also provide our gallery exhibition information in large print format and are happy to provide other formats should they be required. The gallery has also shown exhibitions which are targeted at blind/partially sighted users Staff at Oriel Wrecsam have received training in BSL.

Oriel Wrecsam endeavours to make its services as accessible as possible and encourages visitors to inform us of their needs so that we can try and meet them. For instance, we have provided refreshments in a workshop to cater for those with food allergies.
The above information provides a snapshot of the situation across a number of different local authorities. However, we believe that a more detailed picture of the situation at a local level is needed which looks at the accessibility of all local authority, private and voluntary provision, particularly in relation to venue access. We would suggest that the Arts Council of Wales’s research team would be best placed to conduct the appropriate research.

At the evidence session, the WLGA also agreed to provide a note of the annual local authority cabinet members’ annual meeting. A copy of the discussion document for that meeting has been attached for your information. A further paper, incorporating the comments and suggestions raised at the meeting is being prepared and will be forwarded to you shortly.

If you require any additional information from us, please do not hesitate to contact us.

Yours sincerely,

Chris Llewelyn
Director – Lifelong Learning, Leisure and Information
Introduction

1. The Welsh Local Government Association (WLGA) represents the 22 local authorities in Wales, and the three national park authorities, the three fire and rescue authorities, while the four police authorities are associate members.

2. It seeks to provide representation to local authorities within an emerging policy framework that satisfies the key priorities of its members and delivers a broad range of services that add value to Welsh Local Government and the communities they serve.

3. The WLGA welcomes the opportunity to provide written evidence on the Proposal for a Legislative Competence Order on Culture and other fields on behalf of the local authorities in Wales. This response will make some general comments about the proposed LCO and then go on to highlight specific issues of interest and concern for local government. The WLGA works closely with the Chief Officers of Recreation and Leisure (CORL) who have contributed to this response along with other local authority stakeholder networks.

General Comments

4. The WLGA welcomes the aims and aspirations of the Welsh Assembly Government in developing the Proposal for an LCO on Culture and Other Fields and recognises that the Assembly Government’s desire to acquire legislative competence in culture, sport recreation and other fields is consistent with its current strategic approach to policy development. The WLGA does not oppose this legislative competence being conferred on the National Assembly for Wales but does question the timing of such a proposal given the current economic climate. The impact of the economic recession on government finances and the inevitable pressures on public service funding in forthcoming years make the Association question the prudence of placing any further statutory responsibilities on local government at this time. Local authorities will face significant challenges in future years to meet existing statutory responsibilities and to sustain current levels of service provision. While there is a long standing understanding between the Welsh Assembly Government and local government that any new responsibilities will be fully funded there is concern within local
government that current budgets would be stretched to meet any new responsibilities.

5. It is recognised however that, even if the competence to legislate in these areas is conferred on the National Assembly for Wales, there are significant further steps to be taken, in the form of Measures, before any new legislation takes effect. It is hoped that the Assembly Government would engage fully with local government at this stage and that local authority concerns would be taken into account. It might also be the case that the Assembly Government might want to delay any further proposals for legislation until further discussions had taken place and alternative approaches considered. There would also be considerable merit in waiting for a more conducive economic climate in which to develop further Measures.

**Substantive Issues**

6. In spite of these reservations, the Welsh Local Government Association welcomes many aspects of the LCO proposal and the supporting Memorandum. The strong reference in the Memorandum to the importance of Culture, not as a luxury, but as something that is fundamental to the creation of our national identity and to cross cutting agendas such as regeneration, health, social inclusion and skills development is applauded. The Association fully supports any development which will strengthen the role of these wide-ranging services in meeting the needs of local authorities’ strategic plans. The Association also supports the WAG aim of widening participation in the arts, culture, sport and recreation and the need to overcome barriers such as low income and those associated with geography and demography. The Assembly Government’s recognition of and support for the role of local government in providing cultural and leisure services in this respect is very much welcomed as is the aspiration to deliver high quality cultural experiences across the whole of Wales. The Association questions however whether or not these aims can be fulfilled in the present context within the proposed approach.

7. In the June 2006, the Welsh Assembly Government commissioned report on public service delivery *Beyond Boundaries* (the Beecham Report) identified one of the strengths of the Welsh system as being based on “local organisations that are close to communities and a national government that engages directly with
partners in policy development”. This close relationship with the citizen is particularly important in the case of culture and leisure as the choice of whether or not to engage is dependent on provision meeting needs.

8. The Beecham Report states, however, that citizen-centred delivery “stem(s) in part from an organisational structure inherited from Whitehall, with its complex legacy of statutory and non-statutory requirements on local organisations”. It goes on further to say that what is needed to keep public confidence and respond to public needs is innovation and variety with a limited key minimum standards and service entitlements. “These should be negotiated between the WAG, the WLGA and other stakeholders as a set of core standards which it will be the responsibility of local service providers to deliver in ways most appropriate for their locality and with strong encouragement to go beyond the minimum.” These discussions are taking place at the moment in the form of the New Understanding between local and central government and the on-going discussions around outcome agreements and grant rationalisation. This could provide an alternative approach to achieving WAG’s desired aims. When the Scottish Parliament addressed these issues, it decided not to pursue a Culture Bill seeking instead to use outcome agreements to “inspire greater commitment to providing high-quality cultural opportunities that are developed through community engagement”.

9. For the WLGA it is imperative that there is a “read across” to the “New Understanding” framework document being developed with the Welsh Assembly Government. In this context we need to “factor in” the financial implications of any new LCO emerging from the Assembly and negotiate a position that such new responsibilities are properly funded.

10. It is stated that one of the aims of the LCO is to address the variance in the range and quality of local authority cultural services and activities in Wales. The Association accepts that there is inconsistency in service provision but that this is, often determined by historical legacy, conflicting pressures, individual authority finances and local priorities rather than a lack of will to improve or develop services. At this time of tighter local government finances, it is imperative that authorities are able to adopt a corporate approach that is based on local needs, circumstances and rooted in Community Strategies. There is a danger that legislation and the setting of minimum performance standards
would have the opposite effect to that intended by lowering rather than improving the scope and quality of provision. These concerns are identified and recognised in paragraph 16 of the Memorandum setting out the background to the LCO and it is suggested that greater clarity in the impact of the proposed LCO is needed to safeguard against such unintended consequences. The Association fully supports paragraph 16 of the memorandum in which the need to preserve local flexibility of individual local authorities to determine and meet the cultural service needs of their own communities. Indeed the Association considers autonomy to be able to adapt to local community and partnership needs as an essential pre-requisite of any legislation or other monitoring system or guidance proposed in the future.

11. The WLGA believes also that significant further work is needed in defining the scope of any proposed legislation. The recent Stephens report – *A dual key approach to the strategic development of the arts in Wales* – considered the notion of cultural entitlement and deemed the principle, with a minimum entitlement delineated, to be worthy of “a closer look”. Ensuring that the variety of facets encompassed by the term culture is adequately addressed in any such minimum entitlement is likely to prove a significant challenge however and would need considerable discussion. This is evidenced in the Stephens report when it is stated that “the arts must be differentiated from other cultural needs”. In this instance, it is likely that every facet would make a similar case.

12. The experience of public libraries, which have a statutory basis and of CyMAL – the WAG funded Coordinating Body for Museums, Archives and Libraries - is that the most marked improvement in library services throughout Wales has been achieved by the establishment of Welsh Public Library Standards. The Standards were established in 1992 and include a performance measurement and assessment framework.

13. While this approach presents significant challenges to local government, and not all the Standards can be met, it is evident that all authorities have shown improvement through this non-statutory development. It should also be noted that this approach was supported by additional resources in the form of challenge funding for individual capital projects and nationally led developments particularly within ICT infrastructure and interoperability.
14. There are a number of further issues that relate to the LCO upon which the Association would like further clarification. For example, paragraph 15 of the supporting Memorandum suggests that legislating by Assembly Measure would result in the highlighting of the contribution of cultural activities to cross cutting agendas, raise the profile of cultural activities and the role of local government in supporting them and encourage collaboration. More information is needed on how this might be achieved.

15. Similarly, whilst understanding that detailed consideration might not have been given to how any proposed legislation might be enforcement, the Association recognises that the “devil is in the detail” and would be interested in knowing whether any consideration had been given as to how services would be scrutinised and what critical success factors are likely to be involved. In addition, local government is only one of a number of providers in this service area. The Association would also seek clarification on how the contribution of other key partners – in the public, private and voluntary sectors - in this and related sectors might be assessed.

16. Finally, there is a need for clarity around the development of a new culture strategy or strategic statement on the part of the Welsh Assembly Government in relation to culture and the other fields referred to in the proposed LCO. A number of developments and initiatives have been introduced since the publication of the last strategy, *Creative future*, in 2002 and it would seem appropriate to link the development of any new legislative powers to a revised strategy or revised statement of intent.

**Conclusion**

17. In conclusion, the Association welcomes the opportunity to provide evidence to the Committee on the proposed LCO on Culture and other fields and while not opposing the National Assembly Government’s desire to acquire legislative competence in this area does question the timing of this initiative. The Association does not believe that the current economic climate and the state of public finances are conducive to placing a statutory obligation on local authorities in relation to culture, the arts, sport and recreation. In addition, the Association believes that much more detailed discussion is needed around defining the nature and scope of the services to be covered, how they might be
monitored and regulated and how they should be funded, before any Measures could be brought forward. The WLGA supports fully many of the aims and aspirations outlined in the LCO proposal and supporting Memorandum but believes that there are alternative means of achieving these shared goals. The Association would welcome the opportunity of working with the Welsh Assembly Government and other partners in taking this work forward.

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14 October 2010

Llyfrgell
Library

Llywodraeth Cynulliad Cymru
Welsh Assembly Government

WLGA • CLILC
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1. Introduction - The need for change

1.1 “The worst response to the current economic situation would be for public services to stumble into a series of arbitrary cuts which result in poorer services and loses sight of outcomes for citizens”. This quotation from Better Outcomes for Tougher Times (Welsh Assembly Government’s document setting out how, in the next phase of its public service improvement programme, it intends to work with public services and social partners to transform public service efficiency and drive innovation) encapsulates the rationale behind the focus local authorities, individually and collectively, are giving to investigating alternative methods of delivering quality, community centred services in a more cost effective way.

On 28 September Carl Sargeant AM, Minister for Social Justice and Local Government, announced a review of local service delivery that aims ‘to help local authorities identify opportunities for service change’.

1.2 Library and Information Services face an additional challenge as they seek to shape, improve and maintain service delivery at a time when people have greater expectations, look for more choice and greater accessibility - but with predicted decreasing resources.

1.3 For this reason, standing still is not a realistic option. Local authorities will need to evaluate a wide range of information alongside economic considerations to ensure that public libraries’ contribute to the priorities of Government in Wales at a national and local level and maintain their role in improving the quality of life of so many people.

1.4 The brief for the research undertaken and the subsequent report is intended to inform the meeting convened for elected politicians and senior officers to be held on October 14th which will start the discussion on the future direction of for Welsh public library services. The aim is to provide the Welsh Assembly Government, local authorities and other interested stakeholders with key facts and supporting information to facilitate a decision on the best way forward which
will safeguard high quality library services and contribute to the efficient management of local authority budgets in challenging financial contexts.

1.5 The report identifies a variety of alternative models that have been deployed across the library and information sector together with a summary of the advantages and disadvantages of each model. The report makes no attempt to recommend one model over another at this stage. It is not intended as a comprehensive list but as an indication of the wide range of available options.

1.6 Other home nations are also currently reviewing public library services. MLA (Museums, Libraries and Archives Council), in partnership with the UK Government and the Local Government Association has embarked on a similar exercise in England under the title *Future Libraries Programme*. What is being sought is vision, innovative approaches and sharper investment models. Following a general call for expressions of interest, 10 applications have been selected to undertake further work with support from MLA. The themes of the selected projects include shared services, particularly in rural areas, co-location, community involvement (see also Case study 8 of this report), digital innovation etc. Options appraisals are being prepared for delivery in December 2010. Selected projects will be required to disseminate project reports to the sector to encourage the dissemination of good practice.

1.7 Work is already underway in Wales to explore alternative service delivery models. In March 2010 a questionnaire was sent out to all local authorities using the Chief Officers’ of Recreation & Leisure (CORL) members database asking for information on the current situation in their authority in respect of alternative models to deliver archive, library and information, museum, arts, culture and leisure services together with any plans they might have for the future. A snapshot of the results of these questionnaires (April 2010) is shown in Appendix 1.

1.8 Public library services have always sought to look for new delivery models and have adapted well to change in the past. The challenges of delivering library services via twenty two organisational structures with reducing budgets once
again requires stakeholders to consider new ways of working. This document aims to support this discussion through outlining the available options for further consideration.
2. National models

2.1 The Welsh Assembly Government, through CyMAL: Museums Archives and Libraries Wales (CyMAL) Division, is implementing a £10.5 million strategic development programme entitled Libraries for Life: Delivering a Modern Library Service for Wales 2008-11. Administered by CyMAL, it includes some elements rolled-out at a national level and administered by lead partners

- a national marketing strategy and operational plan (managed by Wrexham CBC),
- a minimum service delivery level across Wales agreed by Welsh Assembly Government (CyMAL), Welsh Local Government Association and Society of Chief Librarians (Wales) which includes free membership; free borrowing of books, free use of the Internet and computers, free use of online information resources and friendly staff on hand to help
- procurement of online newspaper/reference services (managed by the National Library of Wales (National Library), for all Welsh libraries
- library.wales.org - library portal for Wales (managed by the National Library of Wales)
- collaborative resource sharing and delivery services including Cat Cymru, an all-Wales search of Welsh library catalogues
- the Welsh public library standards framework to assess the delivery of statutory services under the 1964 Public Libraries and Museums Act.

2.3 In Northern Ireland a new national body, Libraries NI, was established through an Act of Parliament - the Libraries Act (NI) 2008, at the end of a 5 year lead-in programme. The new arrangements came into operation in April 2009 and as yet no comprehensive evaluation has been undertaken. The new body replaced 5 Education and Library Boards which previously managed public libraries in Northern Ireland.

Case study 1

In Northern Ireland there is one public library service. Libraries NI is the Library Authority for the whole of the province which serves a total of 1.8m people and has
a revenue budget of £31m. It is the largest Library Authority in the UK. The importance placed on "local" relevance is represented in a number of the principles which underpin the work of the Authority:

- "It will be regionally led, but locally delivered and thus responsive to community needs"
- There will be equity of provision with targeted action to address priority issues within local communities
- Good practice will be disseminated….and innovation and creativity encouraged to address new demands and local needs
- It will play an active role in community planning processes to ensure that the needs of citizens are addressed in a holistic manner.”

The Authority is managed by a Board which includes 11 Councillors. This falls short of representation from each of the 26 Councils (responsibilities are more closely compared to Town and Community Councils than County Councils in Wales).

The aim at its formation in 2009 was to save £600,000 of direct library service funding in its first year rising to £1.2m in the second (excluding additional costs incurred as a result of the new organisation such as HR, finance, legal staff etc.). Major cost saving has been in staffing through the rationalisation of high level posts and in improved deployment of staff, in particular professionally qualified, to undertake roles commensurate with their skills and remuneration. Central costs of the new organisation are also lower than those under the previous Education and Library Board system. Management of the service is dispersed with Senior Managers sited in different geographical areas. Libraries NI is part of the NI Assembly’s Department of Culture, Arts and Leisure with the Culture Arts and Leisure Committee undertaking a scrutiny, policy development and consultation role.

The creation of one service was seen as the natural development from a system where a single stock management system, catalogue and library card were in place and where requested items could be sourced from any library and returned to any library within the network.

2.4 A different model has been adopted in the province of Western Australia where public libraries are conducted as a joint venture between the State Government and the local government sector.

Case Study 2

The State of Western Australia which has its own Government occupies a land area of over 2 million sq km, serves a population of over 2,200,000 people and has 141 local government areas. (By way of comparison, the figures for Wales are 3 million population and a land mass of just under 21,000 sq km). The State Library is situated in Perth, in the South of the State. Its Strategic Directions for 2009 -
2011 have five priorities which are Capturing the Western Australia Story, Enriching client experiences, Making collections more accessible, Developing partnerships and community connections, Enhancing the public library network. State and Local Government undertake the joint provision of public library services according to a Framework Agreement. Key Principles which guide the joint provision are as follows:

- Commitment to the partnership with a shared belief that by working together the best possible service can be achieved
- Recognition that planning, development and service delivery decisions, including expansion or withdrawal of services are driven by community needs as well as business needs of State and Local Government
- Local Government has the right of autonomy and flexibility in response to community needs
- Free, universal and equitable access to relevant and up-to-date services regardless of individual circumstances or geographic location
- Transparent approach where both partners are accountable for their respective and mutual responsibilities and where a spirit of mutual respect and co-operation will exist
- Ongoing sustainability of services with a focus on outcomes in setting policy
- Achieving the highest levels of accountability and good governance.

The Partnership is governed by a Library Board of which the majority are appointed by the State Governor with other ex-officio members such as Library Association of Australia - Western Branch, Western Australia Local Government Association and the City of Perth.

2.5 The National Library of Wales currently undertakes some of the roles of the State Library as in the above case study. The National Library is currently investigating the development of a digital library for the whole of Wales. It is piloting the option of automatic membership of the National Library for members of one of Wales’ public library services, enabling the public library members to benefit from a wider choice of online services offered by the National Library that are available from their home, workplace or local library. The National Library’s vision document Twenty-twenty: a long view of the National Library of Wales acknowledges the need to work in partnership at a national level noting that ‘Alliances with local and academic libraries and archives in Wales have a long history of fruitful cooperation’.

Case Study 3

FinELib, the National Electronic Library is a consortium comprising Finnish universities, universities of applied sciences, public libraries and a number of
research institutes and special libraries.

FinELib acquires both Finnish and international electronic resources for the needs of research, education, and learning and promotes the availability and use of high quality information throughout Finnish society. FinELib negotiates license agreements centrally on behalf of its member organisations.

The National Library of Finland is responsible for FinELib and its development in accordance with the guidelines of the FinELib steering group. The National Library cooperates with universities, universities of applied sciences (polytechnics), research institutes and public libraries, and takes part in national strategic initiatives.

FinELib receives centralised funding from the Ministry of Education for the services provided to universities, universities of applied sciences and public libraries.

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3. **Joint working**

3.1 *Beyond Boundaries* (Beecham Report) published in 2006 made a clear case for increased partnership working. The First Minister reiterated the message at a recent Public Services Summit that collaboration “will not be an option but a necessity”.

3.2 This is not to underestimate the complexities of joint working at a formal level. Beecham recognised this when he said “partnership is difficult and needs the investment of time, resources and leadership … For partnership working to make a real difference, politicians are going to have to be willing to go much further in pooling sovereignty with other organizations … The Assembly Government will need rapidly to develop the capacity to deal with local service providers in a joined up way”.

3.3 Users of services often complain of the complexity of public services. It is difficult to know who is responsible for which services and, to them, local authority boundaries hold little meaning. Any structure or collaboration which results in more efficient joined up services will address the need to provide services which align with people’s day to day lives.

3.4 There are various models of joint working eg.

- Cross authority,
- Regional / sub-regional (CyMAL, has supported posts of Regional Development Officers to promote regional working under the Libraries for Life Programme)
- Across departments within the same authority
- Across organisations within a geographic area

3.5 Joint working is prevalent within the library and information sector as a whole. Below is a case study of one authority in Wales to illustrate the wide range of partnerships which already exist and which are replicated in many other local authorities.
Case study 4

Conwy County Borough Council was established at local government reorganisation in 1996 bringing together parts of the previous authorities of both Clwyd and Gwynedd. Its history has resulted in its embracing partners from various directions and parts of the area are represented in 3 different areas of the Wales Spatial Plan, viz North West, Central and North East Wales.

It is a relatively small authority (circa 112k population) and it has suffered challenging grant settlements over a number of years. The Library and Information Service has taken a high share of budget cuts with its book and resources budget being amongst the lowest in Wales, a significant reduction in staff and with almost half of its libraries threatened with closure three years ago.

Despite this it has, through innovative means, been able to develop service and improve its performance against the Welsh Public Library Standards.

The range of partnerships with which the LIS is actively involved is as follows:

Cross authority
- North Wales Libraries Partnership - all libraries in the local authority, Higher and Further Education and Health Sectors working on various initiatives and projects including bidding for resources
- LINC y Gogledd - membership as above (except health) supports interlending of requested books between the partners and facilitates usage of educational libraries by public library users
- TalNet - (see also section 3.8.3 below) with Gwynedd and Isle of Anglesey
- North East Wales Schools Library Service - partnership between Conwy, Denbighshire, Flintshire and Wrexham
- Conwy is also involved in other networks such as HOLIS (Heads of LIS) and Estyn Allan (Reader Development initiative) with sharing expertise and experience as well as avoiding duplication of effort providing economic benefits across North Wales.

In authority/geographical area
- Children and Young People’s partnership - Manages Young Conwy 1 & 2 websites, and the Family Information Service. Is a member of the management Board responsible for Information Strategy.
- Council Information Points at all libraries
- Access point for free bus passes, sells senior citizen railcards as well as Environmental Services consumables (recycling bags etc.)
- Coleg Llandrillo Cymru - Basic skills, IT skills delivery and Job Centre Plus referrals through libraries.
- Senior management responsibility for Archives, Arts and Museums leading to wide range of joint initiatives.

Wales wide
- All-Wales Purchasing Consortium to which 20 library authorities subscribe to
enjoy greater discount as result of the economy of scale
- Libraries for Life all-Wales purchasing of added value on-line resources facilitated through the National Library of Wales
- Opportunity to take advantage of part Wales discounts for further on-line resources.

3.6 External to Local Authority area

3.6.1 The list of the cross authority work in the above case study demonstrates a range of successful and cost-effective joint working initiatives. There are other examples which can be quoted. Archive services in South Wales have, in the main, retained the pre-1996 boundaries with West Glamorgan (based in Swansea), Glamorgan (based in Cardiff) and Gwent (based in Cwmbran) Record Offices serving those areas. North Wales authorities have received a CyMAL grant to investigate the possibility of establishing a regional archive service.

3.6.2 There are examples of long established library service partnerships in England of which SPINE (Public library services in the East of England working together) is one example.

Case study 5

**SPINE, which includes Cambridgeshire, Norfolk, Suffolk, Essex, Thurrock, Southend and Hertfordshire Councils has a strong track record of joint working and bidding for external funding. The services available to the Library services through this partnership include**

- Stock procurement from selection to delivery,
- Preparation of stock for shelf (cataloguing),
- Maintenance of technical infrastructure,
- Access to one another’s catalogue,
- Reciprocal borrowing of items,
- Reciprocal requests,
- Cross authority Enquiry & Information Service.

Building on previous experience and driven by financial, strategic and professional considerations, the partnership has undertaken an exercise to consider a development of its joint working. Its vision is that, by sharing services, they and potential future partners will be able to improve the efficiency of service delivery by reducing costs whilst maintaining service standard to the customer. There will also be the potential to enable investment in future innovations and an opportunity to build in-depth experience around specific service areas.

After intensive scoping, analysis and discussion, an investigation was carried out to consider two models. At the lower end of the spectrum was the sharing of a range of functions whilst at the upper end was the creation of a single regional
library service.

The key criteria which any model was required to meet included:

- Potential to achieve 25% savings over 3 years
- Achievable within timescale
- Satisfies legal and statutory requirement
- Risk is manageable
- Transferable and saleable to other authorities within the region, and possibly other regions
- Attractive to all stakeholders.

Following options appraisal and cost benefit analysis, Spine’s Management Board has opted for the less ambitious sharing of services model as it can be achieved within the required timescale, set up costs are minimal, likely to have the highest cashable savings over the next 4 years, will be acceptable to the widest range of stakeholders.

It is likely to be managed under a Lead Authority management structure.

3.6.3 Most library services in Wales already enjoy many of the benefits of elements covered in Phase 1 of SPINE’s partnership through the All Wales Purchasing Consortium, access to other library services’ catalogues through Cat Cymru, universal membership (as recently agreed through Society of Chief Librarians Wales (SCL(W)).

3.6.4 There are additional areas where joint working could be considered eg. joint management, sharing of specialist staff, joint marketing, pooling some budgets, staff development and mobile library route planning.

3.7 **Within local authority geographical area**

3.7.1 No service within a local authority exists in a vacuum. Library and information services are fully integrated within their parent body on a number of levels. In the first instance, Chief and Principal Officers responsible for library and information services in Wales are also frequently responsible for other services notably within the heritage, culture, lifelong learning and community services. This in itself is a saving with one person managing a range of complementary services, similar services being able to take advantage of joint marketing, IT services etc.
3.7.2 Local authorities will be well advanced in the preparation of local outcome agreements between themselves and the Welsh Assembly Government. Library services can make a major contribution to many of the ten overarching strategic themes. Whether this will be reflected in the agreement will vary from one local authority to another. The Museums, Libraries Council (MLA) publication, *Sharper investment for changing times: getting more out of museums, libraries and archives* makes the following statement -

“The sector can make a massive contribution to tackling some of the most difficult challenges facing the country, but for this to happen, elected members, chief officers and heads of service need to have higher expectations of the service and to make more demands of it”.

3.7.3 Local authorities either own or lease a wide range of buildings but, despite the requirement to draw up local asset management plans to better maintain building stocks, there would appear to be more opportunities to rationalise and reconfigure building deployment within a local authority.

3.7.4 The Welsh Assembly Government initiative 21st Century Schools, managed by the WLGA, requires all authorities to undertake a detailed audit of the schools within their local area whilst also giving consideration to other community needs. Strategic Capital Investment Fund (SCIF) money is being directed towards this project. The initiative may give some libraries the potential to improve buildings as part of wider school/community redevelopment.

3.7.5 There are a range of facilities co-located in libraries. Denbighshire has developed a network of one-stop shop facilities with dedicated staff within a number of libraries in locations where access to services is generally low. Advantage has been taken of the high esteem with which the library is held by the community and its non-threatening, neutral community space.

3.7.6 In Wrexham County Borough Council, four community resource centres with a varied mix of local authority partners, management structures and facilities provided have been developed by a mixture of European Union, local regeneration and local authority funding. The Library Service has worked
together with Regeneration, Youth, Social Services and local communities to add significant value to what was previously available at these locations. The Library Service manages two of the facilities on behalf of the local authority.

3.7.7 Bridgend County Borough Council has a strategic aim to reduce the number of buildings within its area and to integrate services.

**Case study 6**

*Bridgend* County Borough Council has recently opened its 4th joint facility in Maesteg to cover the whole of the Llyfni Valley, including the Community First area. The library part of the facility is the result of the redevelopment of unused space within the Sports Centre, which has been funded by the Town Centre Regeneration Fund and WAG (CyMAL). It had been hoped that opening hours of both part of the complex could be matched but budget cuts have made this impossible. This is a joint facility with the Sport and Recreation Service and follows on from a previous arrangement at Ogmore Valley Life Centre where co-location and joint staffing resulted in opening hours being increased from 21 hours a week to 70.

In a similar arrangement in Pyle, as a result of visionary leadership, two separate buildings (library and sports centre) were brought together through the building of a joint reception area. Under the management of the library service, opening hours were increased from 38 to 65. Another new development will see an adult day centre moving into the complex.

In Sarn, the partnership is with the local community through the Community Council and the Community Association. Both these groups contribute 33% to the cost of running the facility and this is regarded as being a model Bridgend would wish to see replicated in other communities.

3.7.8 Library Services are complementary to services managed by other public sector organisations within the same area, notably in the academic sector. GALW (Gateway to Libraries in Wrexham) is a co-operative between libraries from different sectors, “which aims to share expertise and resources … Through this service we aim to provide enhanced opportunities for lifelong learning and leisure activities.”

Cardiff: Libraries in Co-operation (CLIC) has developed to be as inclusive as possible, “involving libraries from all sectors in Cardiff such as (HE), (FE), public libraries, government libraries, museums, corporate and health libraries.
3.7.9 This “whole area approach” is one supported by Local Government Leadership for Society of Local Authority Chief Executives (SOLACE) Wales in its report *Local public services in Wales: developing a whole area approach*. It develops on the Total Place initiative in England where 13 pilot areas focused on investigating three elements:

- counting the public money flowing into the area
- culture of places and organisations and how that helped or hindered joint working
- customers and how services could be better understood from their perspective.

Through this work, opportunities have been identified for genuine service transformation across organisational boundaries, better development of services around the needs of people in the local area and identification of efficiencies through collaborative working and redesigned services.

Whilst this has been on a local authority wide basis, it could also be deployed with individual services such as library services.

3.8 Models of joint management  

3.8.1 There are different models of management eg.

- Lead body delivering the whole service or some services to other organisations or authorities
- Partners sharing roles and responsibilities
- Full integration of management and delivery of services through the establishment of a “new” organisation.

3.8.2 Arts Connect, a partnership of local authorities within South East Wales, Monmouthshire and Vale of Glamorgan, is well advanced in establishing a joint service for the arts. The intention is to provide a shared arts service with Rhondda Cynon Taf Council as the lead authority. Partners have agreed on a secondment approach, whereby existing officers will be seconded into the new shared service according to the needs of the regional structure. The model
currently being developed is expected to provide 10% efficiency saving over 3 years. The shared service will commence in 2011/12.

3.8.3 TalNet, a partnership between Conwy, Isle of Anglesey and Gwynedd library services set up at the time of local government reorganisation in 1996, undertakes the procurement and delivery of stock, maintenance of catalogue and maintenance of one Library Management System. Each Authority contributes to the cost of running the unit and strategic direction is the responsibility of a Joint Committee of Members, supported by a Strategic and Operational Team of Officers representative of the three authorities and TalNet itself. A formal contract has been signed by the partners.

<table>
<thead>
<tr>
<th>Joint Working</th>
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<tbody>
<tr>
<td><strong>Advantages</strong></td>
<td><strong>Disadvantages</strong></td>
</tr>
<tr>
<td>a) Reduction in assets resulting in reduced running costs of building and potentially vehicles</td>
<td>a) Set-up costs (actual and/or in kind)</td>
</tr>
<tr>
<td>b) Reduction in administrative costs</td>
<td>b) Staff time in servicing joint work</td>
</tr>
<tr>
<td>c) Opportunities for shared staffing, including at management level, which could lead to reduced costs</td>
<td>c) Governance arrangements with potential loss of local total control</td>
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<tr>
<td>d) Potential to develop services</td>
<td>d) Potential loss of identity, customer loyalty and pride in service</td>
</tr>
<tr>
<td>e) Improved access to a wider range of facilities</td>
<td>e) Unequal match of benefits and effort</td>
</tr>
<tr>
<td>f) Economies of scale</td>
<td>f) Issues around staff, and central services</td>
</tr>
<tr>
<td>g) Improved staff structure with greater opportunity for specialisation</td>
<td>g) Risk of failure</td>
</tr>
<tr>
<td>h) Improved marketing potential</td>
<td>h) sustainability, buy-in and ownership</td>
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4. **Externalisation**

4.1 Externalisation (or outsourcing) is defined for the purposes of this report as when a local authority enters into a contract with another entity that is entrusted with the ongoing administration and development of a service.

This section considers three types of externalisation models which might be deployed in the management of library and information services, i.e. trust, community and private sector models.

4.2 **Trusts**

4.2.1 To form a trust, the Council participates in the formation of an arms’ length company, independent of the Council, but with some Council representation on the Management Board, to manage its service either in whole or in part. A grant is paid by the Council to the Trust to manage and operate the service or services.

4.2.2 There are a number of types of Trust. The most commonly deployed is a company limited by guarantee which is set up under the Companies Act as either a charitable or non-charitable company. If a charitable body is selected and it aims to set up profit making activities such as catering, a separate company will need to be established which then gifts all income to the charitable company.

The Industrial and Provident Societies Act 1965 controls the establishment of Industrial and Provident Societies (IPS) which conducts a service purely for the benefit of the community. Once again these can be charitable or non-charitable with the same proviso in respect of profit.

4.2.3 Trusts are more common, particularly in Wales, in the management of leisure or arts facilities and museums. A long standing and well established example of this is in Neath Port Talbot where all 9 leisure centres and swimming pools are managed by an IPS. Some consideration has been given to extending this to include all cultural services.
4.2.4 In the rest of the UK there are a number of Trusts which manage whole services. One of these is the Wigan Leisure and Culture Trust.

Case study 7

Wigan Leisure and Culture Trust was established in 2003 to manage all of the Council’s culture and leisure services. The intention was to improve investment and service quality and to institute a catalyst for change with a more entrepreneurial approach. It has an annual turnover of £30m of which 55% is a fee from Wigan Council. It manages 16 libraries, 3 mobile libraries as well as school and housebound services.

It is a registered charity with an 11 strong Board of Trustees which includes 2 Councillors, 5 members with specific professional backgrounds (eg. HR, finance, learning, health, culture and leisure services) and 4 community trustees. It has a trading arm for catering services and leisure venues. The Trust has successfully bid for a contract to operate leisure services for Selby District Council in North Yorkshire.

Since its inception, developments in respect of library services have been as follows:

- Restructured the management team
- Changed terms and conditions of employment to achieve more flexible opening hours
- £1.2m re-investment in libraries (mainly through saving of business rate and grants available to charitable organisations)
- 18% increase in opening hours
- Increased performance according to Standards and customer satisfaction.

However, there are notes of caution from the Trust’s Executive Director. He says “…there were minimal savings from libraries… (they) have been able to benefit from the exemption of the business rate from our leisure centres.”

MLA (Museums, Libraries and Archives) for England in association with the Trust, has undertaken its own case study of the Wigan Trust and provided a list of suggestions:

- “Ensure the Trust comprises a sufficient range and scale of services to enable efficiencies through scale
- Have clear objectives and focus on the degree to which a Trust can improve services
- Don’t form a Trust to solve a service management or delivery problem or simply to save money
- Find the mix of services that might be managed …to suit local circumstances and needs - there is no best model
- Allow sufficient time for set-up processes to be done properly, expect it to
As finance is a vital factor in determining the viability (or otherwise) of establishing a Trust there are two significant points worthy of consideration. The Welsh Assembly Government’s capital programme for developing community learning libraries managed via CyMAL has supported the modernisation of 68 Libraries since 2008 and successfully improved facilities for the public. However there remain a significant number of buildings that are no longer fit for purpose and do not meet changing needs and customer expectations. It is, therefore, a major challenge for any new Trust to finance this long term issue at the same time as demonstrating service development.

There are examples in Wales of Trusts taking on board the management of buildings and, subsequently, finding themselves without the money to undertake the necessary work and return to local authority control.

A Council may be tempted to provide grant funding to a Trust at a level which has the main element of savings (i.e. NNDR) removed as a way to re-direct cashable savings to other corporate priorities. This sets the Trust a major challenge. If the Trust is expected to secure higher levels of maintenance and development, reinvestment needs to be an explicit part of the local offer.

Moving towards the establishment of a Trust requires significant time, effort and money and rushing into an agreement leads to problems in the long run. Monmouthshire has been investigating the moving of a small theatre to Trust management for well over 18 months and, as is the practice in most authorities, has commissioned a consultant’s report to support them. The cost of this and other associated work is significant. There may be little saving in the short or medium term.

Community

There are various examples of communities, sometimes supported by Town or Community Councils, taking responsibility for local facilities notably community centres. Many of the advantages which apply to Trusts, not least the ability to
apply for charitable and smaller scale grants, are also applicable to community and voluntary groups. Social enterprises can also be formed to invest in the locality and to possibly provide meaningful jobs and promote skills development.

4.3.2 As stated in the introduction, MLA working with the UK government has established a Future Libraries Programme. All local authorities in England were invited to submit “proposals for innovative collaborations and initiatives”. 10 submissions were chosen to receive “practical support and advice” as Phase 1 projects in August 2010. They will be asked to undertake further investigation into the various models and report back by the end of the year. One of the selected authorities is Suffolk County Council.

Case study 8

The main driver for the Suffolk Libraries project is not cost reduction, indeed it was stated that this is not the route that would have been chosen if that was the purpose. The County Council is committed to placing management of direct services as close as possible to the communities which they serve. The project is at a very early stage (political decision to support or otherwise in principle is expected in September/October 2010).

Suffolk is a member of SPINE (see case study 5) and therefore this, together with a virtual library service available to people from their own homes, will provide a backbone for the service. Communities will be responsible for direct delivery at local level only.

Below are some points relating to this proposed local delivery:
- Service from two neighbouring libraries could look very different
- A specification, franchise or service level agreement between the organisation concerned and the County Council will be drawn up to show obligations on both sides
- The agreement document will state the performance reporting required, but it is expected to be light touch
- Possible interested parties could be Town and Parish Councils or community of interest groups established for the purpose
- Association of Local Councils has expressed interest and some financial contribution might be provided by Councils
- Premises would be leased to the organisation by the County Council
- Larger strategic libraries might be kept under full County Council control
- Parallel is drawn with the local management of schools with governing bodies
- Successful organisations will be responsible for staff matters including setting
4.3.3 Reactions to the reporting of the new proposals in the Suffolk media have produced mixed responses. Many of the detractors are concerned at the loss of professional standards of service, in particular staff expertise.

4.3.4 Another unknown is the appetite for taking on local authority services. The Commission on 2020 Public Services consulted with a number of people whilst preparing its vision report. One of the comments would appear to reflect the view of a number of others - “I would like to be able to say "I'm not really happy with that", but I'm quite happy that (running the service) is not my responsibility.”

4.3.5 In Newport there are long standing arrangements for the relevant clubs to manage and run the Newport Indoor Bowling Centre and the Caerleon Golf Club. The arrangement is considered to have been successful in that there is a community of interest around the two sports with commitment of individuals to their sport and their club. Similarly in another authority, a one-sport club is run well by a Trust whilst in the same community an arts based organisation is struggling to find appropriate people to lead the Trust.

4.3.6 Diversity has been at the core of public library services since their inception, ensuring the whole community is encouraged to use libraries to meet their educational, informational and leisure needs. Were this to be diluted in any way, a value which libraries have safeguarded would be severely damaged. Ironically, it is in areas of greatest need, such as high social deprivation and cultural diversity, that participation from these communities is likely to be at its lowest.
4.3.7 There is a long standing tradition in museums in the deployment of volunteers to undertake specific tasks. Whilst not advocating volunteers taking over paid posts, it may be useful in today’s climate of volunteer empowerment, to look at lessons from museums to see whether this practice could be extended to library services to provide added value.

4.3.8 The table below shows advantages and disadvantages which are relevant to both Trust and community models.

<table>
<thead>
<tr>
<th>Externalisation- Trust / Community</th>
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<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>a) Relief from NNDR (rates) of 80% mandatory and additional 20% discretionary if a charity</td>
</tr>
<tr>
<td>b) Other fiscal benefits for charities such as VAT, Capital Gains Tax, Inheritance Tax etc.</td>
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<tr>
<td>c) Ability to borrow to secure capital outside of local authority regulations.</td>
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<tr>
<td>d) Access to additional sources of grant funding or business sponsorship.</td>
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<tr>
<td>e) Single focus management, not tied into or competing with other local authority services.</td>
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<tr>
<td>(f) Increased community involvement through direct representation on the Trust Board.</td>
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<tr>
<td>g) Greater defence against closure by authorities requiring cost reduction</td>
</tr>
</tbody>
</table>

4.4 Private sector

4.4.1 A small number of private sector companies exist to manage culture and leisure services on behalf of the public sector. It is usually leisure service facilities or whole leisure and culture services that are involved as financial
return can be achieved through increasing levels of income and reducing costs such as offering lower levels of staff wages.

4.4.2 A partnership between a private contractor and a local authority usually involves contractual agreement for a set time. Staff transfer to the new company, initially under TUPE. A management fee is paid to the contractor and the contractor retains all income. It is responsible for all costs other than the external fabric of the building(s) and major operational plant replacement. This is an important consideration as it is often these high costs which Councils find difficult to fund.

4.4.3 The longer the length of the contract, the more attractive it is to the private sector as it allows the contractor to invest in new equipment etc. and be confident of a return. The minimum contract is considered to be 5 years.

4.4.4 Flexibility is important in the production of a contract. There may be a need to make small changes to meet Council or Government priorities e.g. focus on participation by and marketing to low income or disadvantaged groups. Cooperation between the contractor and the Council will be required to achieve the proposed outcomes. Carmarthenshire has returned a facility to local authority management as the numerous social and political agendas of the authority were not dealt with through the contract.

4.4.5 The current economic situation has reduced the number of companies that are likely to tender for leisure contracts and have hardened attitudes to become even more profit focussed. This then introduces the issue of competition, especially as there is only one such company based in Wales.

4.4.6 Examples of private/public leisure contracts are few in Wales. Flintshire has appointed a private sector partner to handle the Council's redevelopment for its leisure portfolio over the next four years, with an investment potential of up to £10million. Alliance Leisure will project manage, design, build and fund a number of redevelopments throughout the contract and support the facilities to realise income.
4.4.7 The only known public library service in the UK managed by a private organisation (John Laing) as part of a libraries, parks, museums and arts package is Hounslow. These services were previously managed by a Trust.

The intention is to invest significantly in services, notably the built estate. Funding to deliver will be paid from prudential borrowing, repaid through reducing revenue costs paid as part of the contract as a result of efficiency savings over the 15 year period of the contract.

4.4.8 At a CILIP Executive Briefing held in June 2010, representatives of John Laing and GLL (a private company which runs many of London’s leisure facilities) identified a number of considerations both general and specific to library services:

- “You can’t pass problems on to operators”
- Central re-charges (normally legal, HR, finance, IT costs) are retained by Councils
- Cost of the process of procurement of the appropriate operator
- Restrictive income generating opportunity of libraries
- Intangible aspects of libraries value and performance
- No real universal quality or performance standards
- More holistic provision.

4.4.9 Slough Council has recently embarked on an exercise intended to select a most appropriate partner to manage its library services.

**Case study 9**

**Slough** Borough Council’s Library Service includes 4 main libraries and 4 community hubs with an annual budget of £2.2m. Libraries are seen as a top priority for the Council and Members are anxious to maintain stock and opening hours as well as to increase community hubs. A service review in 2009 identified no major issues in respect of service management. Neither did it show particular promise. The Council decided that economies of scale could benefit the service. Expressions of interest from public, private or voluntary sector organisations were invited in February 2010.
7 such expressions were received (2 from other local authorities and 5 from the public sector) and two preferred bidders were selected (as it happens, one from each sector). The result of this tendering exercise is expected to be known in October.

The contract will be delivered according to a client/contractor relationship with Slough Council continuing to make the policy decisions. The Council’s branding will continue and accountability will be retained at the local level with monthly and quality monitoring as well as presentation to Scrutiny Committees as required. Buildings, stock and IT networks will be provided through a lease arrangement.

Key outcomes sought from the successful partner are fairly ambitious and include 27 actions under the headings of better meeting community and customer expectations, improving performance, improving access to services, improving use of resources, and improving efficiency in library operations.

The Council is seeking to move quickly with the aim of TUPE technicalities, preparation of new staffing structure and contractual details being completed by January 2011.

4.4.10 The Audit Commission report Public Sports and Recreation Services - making them fit for the future, concluded that private sector partnerships, on average, provided leisure management services for less revenue cost than trust or in-house. These companies achieve best value by more assertive marketing, the use of national branding and general efficiencies and economies of scale. The success of private sector organisations in respect of library services alone has still to be tested.

<table>
<thead>
<tr>
<th>Externalisation - Private Sector</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Known level of financial commitment over the contract period to enable a planned programme of investment and development</td>
<td>a) Lack of focus on service development and social objectives with concentration on income generation</td>
<td></td>
</tr>
<tr>
<td>b) Investment potential through new capital or from profit</td>
<td>b) NNDR etc. still payable if Council retains building</td>
<td></td>
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<tr>
<td>c) Commercial approach to management and income maximisation</td>
<td>c) Procurement costs can be high</td>
<td></td>
</tr>
<tr>
<td>d) Improved marketing taking advantage of national branding</td>
<td>d) Danger of inflexible contract that stifles enterprise</td>
<td></td>
</tr>
<tr>
<td>e) Competitive bidding process ensures best value for money</td>
<td>e) Lack of comparisons in library services market</td>
<td></td>
</tr>
<tr>
<td>f) Savings through economies of scale</td>
<td>f) Loss of overall control</td>
<td></td>
</tr>
<tr>
<td>in respect of support costs</td>
<td>g) Availability of expertise in different areas of work</td>
<td>g) Difficult to reverse</td>
</tr>
</tbody>
</table>
5. “Status quo”

5.1 The definition for “status quo” for the purposes of this report is the existing state of affairs. This is the conservative option having been tried and tested for 24 years and with little effort or additional costs (direct or indirect) involved.

5.2 But is “status quo” a realistic possibility? The major reason for commencing a debate on organisational redevelopment for library services is the deteriorating economic situation all authorities are already experiencing with projections of major financial challenges starting with the 2011 - 2012 financial year. There are examples of authorities planning for a reduction in budget on a scale that cannot be managed by “efficiency measures” alone and will directly effect core library provision and impact on services to the public. In the age of austerity, local authorities will be looking critically at all services and will be forced to take difficult decisions in respect of all services including ones that have been considered “essential” or are statutory. It is highly likely that some services will have to cease to meet the budget shortfall.

5.3 Findings from the 2007 Living in Wales survey into Citizens’ Views of Public Services reflects questionnaire responses from almost 8,000 people about, amongst others, library services. 33% of these had used a library in the previous 12 months. Of the library users who responded, level of satisfaction to the question as to whether staff were helpful and whether customers were treated with dignity and respect were high (98%). A similar figure of 97% found it had been easy to obtain any information they required.

5.4 In CILIP’s Professional Standards of Service report, the author (Patrick Conway) identified 4 staff related areas which might reasonably be expected to provide professional service:

- A satisfying experience provided by courteous, helpful and knowledgeable staff
- A developed casework approach where the customer benefits from an officer’s professional judgment which could cover information and advice, reading development, learning opportunities etc.
• Determining local operational priorities and developing local partnerships with other organisations eg. stock, use of space, activities and priorities
• Provision of strategic leadership and advocacy to provide a library service which has an influence on social and public policy in the local authority area.

5.5 The Society of Chief Librarians (Wales) has produced a paper on workforce issues and noted various concerns. Amongst them are:

• Many library posts have been lost within council structures (examination of library structures as part of this research show a number of posts are frozen and one authority reports 8 vacancies to keep within budget)
• There is little opportunity for career progression for library staff in many authorities due to flat structures
• Many current library leaders are planning for retirement and there is limited succession planning in place at national level.

These concerns are likely to be intensified during the forthcoming time of economic pressure. More and more authorities are looking for flatter structures. Library services are becoming part of increasingly larger departments whether they be lifelong learning, community or regeneration. The opportunity for strong professional library leadership within such a structure will be a challenge.

5.6 The major instrument for performance measurement and assessment for public libraries in Wales is the Welsh Public Library Standards (WPLS) 3rd Framework April 2008 - March 2011. There are 14 WPLS grouped under key service aspects, which are to be achieved within the 3 year period of the Framework eg. “… library authorities will ensure that the following ICT-based resources are available to users: general and reference information services, newspapers and other current information online, community information, citizen information, local history and family history information, e-learning resources and services”.

In addition there are 13 Performance Indicators eg. The % of total authority revenue budget spent on the public library service.
As can be seen from the examples given, some of the standards are based directly on finance available whilst others, eg. "...the proportion of occupied household within 2 miles of a static service point shall be at least 75%" are indirectly affected.

5.7 Returns from local authorities are assessed annually and full reports sent to Chief Executives, Council Leaders, Performance Officers and Heads of Service. It is to the credit of library service managers that the number of standards fully met have been maintained overall for the year ending March 2010 and even improved upon through incremental creep. The most positive returns are usually attributable to effective, imaginative management and visionary leadership, where the library service is an integral part of the parent authority’s planning process and where the service has worked with its communities and partners to assess and deliver according to local needs. However, there are early indications that next year’s returns (the last of the current framework) may not be as positive.

5.8 The Minister for Heritage has agreed there should be a 4th Framework of Standards for the period 2011 - 2014. The Fourth framework recognises the changing financial context for the delivery of public library services and focuses on outcomes for users.

5.9 Research has shown that what customers look for most when they use the library is access to a wide range of books, ICT resources, modern buildings providing an attractive environment, and knowledgeable staff to assist and advise them. Library services budgets, almost in their entirety, consist of spending on books and similar resources, staff and buildings. It is only by reducing the costs of one or more of these three elements that the scale of savings likely to be expected in the coming period will be realised and, by definition, the attributes appreciated by public are likely to be affected.

5.10 The population size of local authorities in Wales is low and, thus by definition, the overall budget available is reduced. Research carried out in 2006 for the Department of Communities and Local Government by the Centre for Local and...
Regional Government Research at Cardiff University into the relationship between population size and local authority performance in England considered a variety of measures, many of which are not relevant to Wales. The Value for Money (VFM) measure is the most interesting where it was found that 2/3rds of these measures were adversely affected by low population figures with the strongest effect being felt by lower spending services such as culture and leisure.

5.11 However, the report did also concede that the relationship between population size and performance is a complex mosaic of effects. The nearer local people feel to their council, the higher their satisfaction rate. This is keenly felt within library services where local communities feel passionately about “our library” and protest vehemently when there is any threat of closure.

<table>
<thead>
<tr>
<th>Status quo</th>
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<tbody>
<tr>
<td><strong>Advantages</strong></td>
</tr>
<tr>
<td>a) Democratic local community representation</td>
</tr>
<tr>
<td>b) Service able to directly contribute to Council's plans and priorities and to meeting agreed outcomes</td>
</tr>
<tr>
<td>c) Supports interaction and synergy between service areas eg. library services and schools leading to joined up services.</td>
</tr>
<tr>
<td>d) Least disruption to services and staff, no start-up costs incurred</td>
</tr>
<tr>
<td>e) Close to the community served and able to react to specific needs</td>
</tr>
</tbody>
</table>
6. Summary

6.1 The recent announcement by Carl Sargeant, Minister for Social Justice and Local Government, Welsh Assembly Government of a review of local service delivery demonstrates that this research into the organisational re-development of library services in Wales is extremely timely.

6.2 The research, commissioned by CyMAL and building on work carried out by the WLGA, is the first component of an evidence base to inform stakeholder discussions.

6.3 Research undertaken so far has considered relevant developments in Wales, the rest of the UK and also in other parts of the world. The research has identified that the “status quo” is not a realistic option in the current economic climate and has outlined three initial models which address the governance and delivery of public library services in Wales.

6.4 These models are:

6.4.1 National model - key points
- National co-ordination - e.g. core offer of service
- National delivery of service elements - e.g. library management system, online services
- National service - e.g. Northern Ireland

6.4.2 Joint working - key points
- Within a local authority - e.g. shared service delivery
- External to a local authority - e.g. regional partnership
- Joint management - e.g. lead authority

6.4.3 Externalisation - key points
- Delivered via a trust
- Delivered by the community
- Delivered by the private sector
6.5 The research identified that no one model contained all the advantages and none of the disadvantages and therefore a hybrid model may also be an option.

6.6 The seminar to discuss the future of public library service delivery in Wales on 14 October, jointly organised by the WLGA and CyMAL, will invite stakeholders to comment on the delivery models and identify how the process should be progressed in the short and medium term. Effort will be focused on making an effective contribution to business planning by local authorities and the Welsh Assembly Government.

6.7 The organisational re-development agenda will form part of the next strategic development framework for library services in Wales. This new framework, covering the period 2012-15, will be the subject of a public consultation in 2011.

6.8 The upcoming review process to be initiated by the seminar is an essential element of the joint requirement to ensure that public libraries as a statutory service continue to have the necessary resources and the capacity to improve the quality of life of the people of Wales.

RA
10/2010
### Appendix 1 - Highlights from Questionnaire responses (correct as in April 2010)

<table>
<thead>
<tr>
<th>Authority</th>
<th>Current position</th>
<th>Future Plans</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Blaenau Gwent</td>
<td>Community organisations operate out of Blaenau Gwent owned buildings</td>
<td>Consultants recently commissioned to undertake review of Sports Services.</td>
<td>Developing Arts Connect (See RCT)</td>
</tr>
<tr>
<td>Bridgend</td>
<td>Arts venues run by community organisations in receipt of local authority annual grant. One is led by community social enterprise, the other is a company limited by guarantee supported by Town Council.</td>
<td>In principle, support given politically to investigate “Trust” status for sport and recreation services</td>
<td>Financial projections suggest it is inevitable that core delivery will shrink. Crucial to develop partnerships, facilitate opportunities and commission other organisations to deliver on our behalf. Developing Arts Connect (see RCT)</td>
</tr>
<tr>
<td>Caerphilly</td>
<td>One small leisure facility managed under Trust status from the outset as per grant conditions. Other examples of theatres in Trust but managed by CCBC.</td>
<td>Investigation undertaken to move leisure service and possibly libraries into a Trust but discussion stalled at late stage.</td>
<td>Regional meeting to discuss could be useful. Developing Arts Connect (See RCT)</td>
</tr>
<tr>
<td>Cardiff</td>
<td></td>
<td>In very early stages of options appraisal in order to decide the best way forward.</td>
<td>Options appraisal is key to be sure of political view and the vision for leisure to feed into this. Key issue is capital investment due to age of centres.</td>
</tr>
<tr>
<td>Carmarthenshire</td>
<td>Some leisure service facilities delivered through the voluntary sector whilst others are provided through the local Town/Community Council. Previously one leisure centre was</td>
<td>Going to be considering various models in the near future due to financial situation.</td>
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<tr>
<th>County</th>
<th>Details</th>
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<tbody>
<tr>
<td>Ceredigion</td>
<td>Joint Library Management System procured with Pembrokeshire and Neath Port Talbot.</td>
<td>Four pools run as Charitable Trusts that receive financial support from the Authority based on SLA.</td>
<td>Linked in to reorganisation of schools/education looking at a more joined up approach possibly developing 3-19 years educational sites that also include pool, leisure centre etc. Currently undertaking reviews, workshops etc. exploring possible ways forward.</td>
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</table>
| Conwy      | TalNet - a formal, constituted partnership of Anglesey, Gwynedd & Conwy to provide and maintain the library management system, joint catalogue and procurement of stock etc. Overseen by Joint Committee of Members of 3 authorities. Linc y Gogledd Partnership includes all North Wales Authorities, 2 Universities and 4 FE Colleges to provide cross agency membership and loan of items. North East Wales Schools Library Service - see Flintshire Sport Association (Trust) manages one Leisure Centre. | Discussion ongoing but at early stages in respect of greater joint working at 3 levels:  
- extending LINC further to public and academic library services  
- archive service - consultants report received  
- arts service - consultants report received | Size and geographic context, including demography of the Authority advises applicability. |
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<tbody>
<tr>
<td>Denbighshire</td>
<td>3 Trusts, 2 of which manage single arts/heritage facilities. Newnet - partnership with Flintshire in respect of joint library management system, stock procurement. Newplay - see Flintshire North East Wales Schools Library Service - see Flintshire</td>
<td>One option being considered is the formation of a larger trust to manage more than one facility. Archives and arts service - see Conwy.</td>
<td>There is limited capacity in house to manage proposals/projects like these. It would be inevitable that this would be work completed by 3rd parties and resources would need to be found for this.</td>
</tr>
<tr>
<td>Flintshire</td>
<td>Company limited by guarantee manages land and buildings for Heritage site under a Management Agreement. Newplay - partnership between Denbighshire, Flintshire and Wrexham to deliver play development and management services. Newnet - see Denbighshire Linc y Gogledd - see Conwy North East Wales Schools</td>
<td>Close to identifying a Development Partner for major Leisure Centre. If successful will involve Partnering Agreement with a private sector company which would lead to specific improved facilities being funded by private sector and operated by FCC with repayments on funding met from increased revenue. Archives and arts service - see</td>
<td>Working in full partnership with others remains even more the only way our essentially discretionary services will survive over the next years in anything like the shape they are in now. Members would acknowledge the poor condition of many buildings within Leisure portfolio and also the limited ability of the Authority to do anything about this at their own hand.</td>
</tr>
<tr>
<td>Authority</td>
<td>Library Service. Partnership involving also Conwy, Denbighshire and Wrexham managed by a joint team of senior Officers.</td>
<td>Conwy.</td>
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<tr>
<td><strong>Gwynedd</strong></td>
<td>Leisure Service manages 2 sites not owned by the Authority and run another site owned by the Education Department.</td>
<td>Local Trust Group established to run a local pool earmarked for closure. Dependant on WAG funding. Local Authority carries the cost of keeping the building open.</td>
<td>Authority had developed a leisure strategy (January 2008) but have not adopted the original decision to close a pool. Consideration was given to closing another dry facility but decision taken to conduct a further review.</td>
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<td></td>
<td>Talnet - see Conwy</td>
<td>Archives and arts service - see Conwy</td>
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<td></td>
<td>Linc y Gogledd - see Conwy</td>
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<tr>
<td><strong>Isle of Anglesey</strong></td>
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<tr>
<td></td>
<td>Talnet - see Conwy</td>
<td>The Executive has instructed the Head of Leisure Services to present a detailed report of the future of indoor Leisure Centres to be presented by January 2011 to include options on how to sustain the service through alternative management arrangements. A separate instruction under the Savings Strategy programme has demanded that the full externalisation of Leisure and Culture be considered.</td>
<td>It would be useful if a national seminar or workshop could be arranged.</td>
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<tr>
<td></td>
<td>Linc y Gogledd - see Conwy</td>
<td>Archives and arts service - see Conwy</td>
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<tr>
<td><strong>Merthyr Tydfil</strong></td>
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<td></td>
<td>As part of drive on efficiencies, outsourcing smaller Community Centres to social/ volunteer groups, working in partnership</td>
<td>Power point presentation to Councillors, Chief Officers and senior managers provided.</td>
<td></td>
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</table>
with the LA, being considered. Some of the buildings will require capital improvements before transfer and this will be done with income generating potential to become more self sustaining. Developing Arts Connect (See RCT)

| Monmouthshire | Actively pursuing the transfer of Theatre to a charitable trust (legal entity not yet formed). Negotiations continuing re lease, rental, maintenance etc. with view to transfer early in the 2010/11 financial year. Scoping study and options appraisal undertaken in respect of museums but not pursued. Arts Connect (See RCT) | “Don’t let anybody in Council think that this is a way of making immediate significant savings”.

| Neath Port Talbot | Trust formed (as an Industrial and Provident Society) in 2004 which operates all leisure centres and swimming pool (9 in number). Joint Library Management System procured with Pembrokeshire and Carmarthenshire. | Considering expanding the model to include Culture. | Success demonstrated:
- improved service demonstrable via customer surveys
- reduced operating costs with estimated savings over 6 years in excess of £3.5m
- investment in facilities in excess of £1m since transfer

<p>| Newport | 2 voluntary groups have licence to run 2 single sport facilities. Dry leisure centre leased to a trust on 99 year lease. Visitor Centre transferred to Trust. | Looking at a partnership arrangement with a national cultural organisation in respect of management of one facility. | Experience has been that voluntary organisations running facilities are successful where there is a strong community of interest around a common theme/sport and a large number of volunteers who are actively... |</p>
<table>
<thead>
<tr>
<th>Authority</th>
<th>Services/Programs</th>
<th>Challenges/Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pembrokeshire</td>
<td>Joint Library Management System procured with NPT and Carmarthenshire.</td>
<td>Various methods to operate facilities including Trusts arrangements but no decisions to date. Working to improve everything on a continuous improvement basis to make operation more cost effective, Looking to make a range of efficiency savings to protect core service. Just completing a £20m rebuild and refurbishment programme of leisure facilities.</td>
</tr>
<tr>
<td>Powys</td>
<td>Locality based/managed services on a multi disciplinary model. Arts service - see Conwy.</td>
<td>Council has considered in detail Trust/Contractor models but discounted because did not demonstrate clear financial benefit without significant risk. Now commissioning a detailed condition survey of all Leisure property to better understand future challenges.</td>
</tr>
<tr>
<td>Rhondda Cynon Taff</td>
<td>Leading on Arts Connect to establish a regional shared service for the arts covering 7 local authorities across SE Wales Valleys and Monmouthshire. Currently seeking political agreement on an agreed joint structure. Phase 2 aimed to seek Trust status. Initial aim was to provide savings to match anticipated 10% efficiency savings sought by authorities but current budgetary</td>
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<tr>
<td>Area</td>
<td>Description</td>
<td>Action</td>
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<tr>
<td>City &amp; County of Swansea</td>
<td>Leisure Trust operates and manages LC (Swansea Leisure Centre). Joint Venture /Partnership Company with Swansea University to manage Wales National Pool and Swansea Sports Village. Contribute to the cost of managing National Waterfront Museum management overseen by independent board.</td>
<td>Considering options to expand the Trust option to include all Indoor Leisure facilities, theatre and other cultural venues. Spent (a significant amount) on specific legal and business planning advice from external specialists. Currently scoping out a CCS specific exercise with WAO and Price Waterhouse Cooper to look to arrangements to manage and monitor the relationship and agreement with the Trust.</td>
</tr>
<tr>
<td>Torfaen</td>
<td>Torfaen Museum, Congress Theatre and Llanarthman Grange Arts Centre operate under Trust management all of which receive grant funding from TCBC</td>
<td>Council has taken decision to review leisure and cultural services. Corporate Senior Management Team will receive a report in the near future around work streams of financial performance, customers and quality, education/schools provision, alternative forms of management. Developing Arts Connect (See RCT)</td>
</tr>
<tr>
<td>Vale of Glamorgan</td>
<td>Officer Working Group currently looking at future Management options. Soft market test exercise undertaken with possible partners. Cabinet has approved the commencement of the process of procuring a private partner organisation to manage Leisure Centres.</td>
<td>Review is predicated on assumption that “status quo” (level of provision and form of management arrangements) is highly unlikely to be an appropriate response to the post 2011/12 public services outlook. Local review suggests both rationalisation and reinvestment of any savings would need to be an explicit part of the local approach.</td>
</tr>
</tbody>
</table>
| Wrexham | Regional Tennis Centre managed by Tennis Club with group of Directors with the range of skills and commitment to manage the business.  
Stiwt (performing arts venue) Trust.  
GaLW (Gateway to Libraries in Wrexham), is a co-operative between all libraries (public and academic) which aims to share expertise and resources with anybody who works, lives or studies in Wrexham.  
North East Wales Schools Library Service - see Flintshire | Archives and arts service - see Conwy. | Joint provision, not just between different local authorities but also between different public services such as HE, FE etc. within a geographic area is an option that should also be considered. Key issue is trying to avoid a scenario where hasty decisions are taken which have implications for a decade or more. |
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