

Joining the dots:
a report on music library provision
in the South West

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1. Introduction

Fiona Goh was commissioned by Somerset County Council, with funding from the South Western Regional Library Service (SWRLS), to undertake research and consultancy into music library provision in the South West as follows:

- To map current public music library resources across the South West, including music holdings; staffing and physical resources; charging structures; usage, activity and audiences; customer access; logistics and systems; costs of operating the service
- To identify and explore operating models elsewhere
- To make recommendations about the future development of the South West's service, including short term-measures, such as existing inefficiencies and standardisation as appropriate, as well as potential longer-term solutions to ensure a thriving and robust service, responsive to the challenges of the current funding and technological climate.

The project steering group was led by Somerset's Sue Crowley and comprised Jill Barker (Gloucestershire), Amanda Macdonald (Plymouth), Barry Meehan (Bournemouth) and Linda Moffatt (Cornwall).

2. Methodology

A scoping document detailing the range and parameters of the research process was agreed by the researcher and the steering group. The research population was divided into core stakeholders (the steering group members' own library services plus Wiltshire and Bristol), plus a further 12 regional stakeholders (Bath & North East Somerset, Devon, Dorset, Guernsey, Hampshire, Jersey, North Somerset, Oxfordshire, Poole, South Gloucestershire, Swindon and Torbay). Core stakeholders were asked a broader range of questions, including detailed questions about costs and operating logistics. All respondents were asked about resources, charging and loan statistics. All respondents are current members (or associate members) of SWRLS.

Research was conducted primarily by phone, with e-mail support, using named contacts for each service. Respondents provided information in the format available to them, which did not always match the rubric of the data collection template. Research was conducted from January – March 2017.

3. Mapping the South West's music library provision

3.1 *Music resources*

Respondents were asked to quantify their music holdings within four categories: orchestral sets; vocal scores (i.e. choral works for larger forces); part-songs/choral sets/anthems (i.e. smaller works for chorus which would be part of a packaged set) and chamber music. Not all libraries were able to quantify their holdings across these categories, as noted below. The following

table shows the music resources available within the region’s public libraries (highest figures highlighted for each type):

Authority	Chamber sets	Orchestral sets	Vocal sets	Part-songs
Bath & NE Somerset	41 across all categories			
Bournemouth	3,451 ¹	1,353 ²	599	127
Bristol	0	331	900 across both categories	
Cornwall	0	41	237 across both categories	
Devon	245 across both categories		861 across both categories	
Gloucestershire	313	485	288	364
Hampshire	0	1,263 across three categories		
Plymouth	315	1,070	750	950
Somerset	1,000	728	1,206	2,028
Swindon	0	0	10	0
Wiltshire	139 ³	204 ⁴	750 across both categories ⁵	

The other authorities questioned had no music resources at all⁶:

- Dorset
- Guernsey
- Jersey
- North Somerset
- Poole
- South Gloucestershire
- Torbay

Where respondents had any music, these resources were all active.

3.2 Charging structure

¹ This figure includes 1,950 sets for a variety of ensembles (including concert band, jazz band, brass ensemble, percussion ensemble, wind ensemble, recorder ensemble and string orchestra) recently acquired from Dorset music service – as above, these sets have yet to be fully processed and verified by Bournemouth so the final figure may be lower. N.B. Bournemouth does not charge for chamber music hire and this music is treated in the same way as individual scores.

² This figure includes 600 sets recently acquired from Dorset music service – these sets have yet to be fully processed and verified by Bournemouth, so the final figure may be lower.

³ This is estimated, based on 1,111 parts recorded by Wiltshire. We have estimated an average of 8 parts per set to arrive at this figure.

⁴ This is estimated, based on 9,513 parts recorded by Wiltshire. The sets number has been derived by using the same ratio of parts to sets as Plymouth has recorded.

⁵ This is estimated, based on 39,280 copies recorded by Wiltshire, of which the majority are large vocal scores. The sets number has been derived by comparison to Plymouth’s vocal sets holdings (where 40,000 = 750).

⁶ Some of these respondents were able to give meaningful data for some categories, and where this was possible, their responses have been listed. Some authorities – such as Poole – had no activity to report so their responses have not been listed. Oxfordshire’s data did not come back in time to be included but they do have active music resources across orchestral, vocal and part-song music. Their chamber music is not treated as a music set but held on open shelves.

No-one operates a subscription service for customers except Somerset, who offer a fee model based on group size and location⁷ and Hampshire, who charge a flat fee of £15 for membership then charge per loan.

There were a variety of charging models for overdue returns, summarised here:

Authority	None	≤£10	>£10	Notes
Bath & NE Somerset		•		Rarely charged in practice but £1.50 per day up to £30
Bournemouth		•		£10
Bristol			•	Rarely charged in practice but £18 plus £2.50/week up to £40
Cornwall		•		£10
Devon		•		£10
Dorset			•	£20
Gloucestershire		•		Same charge as books – up to £8.20 per item.
Hampshire		•		Rarely charged in practice but 20p/part per day
North Somerset			•	£15 then £2/week up to £30
Oxfordshire			•	£12.50/week per set – no maximum
Plymouth	•			
Somerset			•	Rarely charged in practice but same as request fees (e.g. £15-£17 for orchestral sets per week for up to 3 weeks)
Swindon		•		£10/month
Wiltshire			•	£30 for the set

In addition, those libraries who primarily supply music sets through ILLs will pass on charges from the source libraries, as appropriate.

This summarises the charging models for missing or incomplete returns:

Authority	None	c.£10	Varied	Notes
Bath & NE Somerset			•	Replacement plus binding costs for own stock or ILLs

⁷ Somerset's fee structure is for groups <20 (£30 Somerset, £50 outside), groups 20 – 50 (£50 Somerset, £75 outside), groups >50 (£70 Somerset, £100 outside).

Authority	None	c.£10	Varied	Notes
Bournemouth		•		£10 initial charge then £5 fee plus replacement cost if necessary
Bristol		•		£10.50 for incomplete sets returned without notification
Cornwall			•	Replacement cost
Devon		•		£10
Dorset	•			Only initial overdue charge applied
Gloucestershire			•	A few weeks renewal to help find the part then £15 non-refundable cost, and replacement required
Hampshire			•	Replacement cost
Oxfordshire			•	Replacement cost or £10 admin fee plus cost if Oxfordshire source
Plymouth			•	Replacement cost
Somerset		•		£10.50 for incomplete sets returned without notification
Swindon			•	Replacement cost
Wiltshire			•	Replacement cost or adult non-fiction hardback book rates for out of print (£15.80 or £22)

Again, all libraries who supply music sets through ILLs will pass on charges from the source libraries, as appropriate.

This table summarises the charges libraries make for ILLs inside and outside SWRLS:

Authority	ILLs inside SWRLS	ILLs outside SWRLS
Bath & NE Somerset	Free	1BL/CONARLS per set of 20
Bournemouth	Free	2BLs per vocal set of 40 or orchestral set for 6 months; 1BL per set of 40 small anthems/part-songs
Bristol	Free	1BL or £6 CONARLS per vocal set of 20; 2BLs or £12 CONARLS per orchestral set
Cornwall	Free	1BL per vocal set of 20 or orchestral set (any size)
Devon	Free	1BL per set of 25
Gloucestershire	Free	1BL for 40 vocal scores or part-songs/1 box of orchestral music (may require more boxes)/chamber music

Hampshire	Free	1BL or £6 CONARLS per vocal set of 20; 2BLs or £12 CONARLS per orchestral set
Oxfordshire	2BLs per orchestral set; 1BL per vocal set of 20	1BL per vocal set of 20; 2BLs per orchestral set
Plymouth	Fees to use the service charged to SWRLS members on a sliding scale, based on previous year's usage	Part-songs £36/box; bound vocal scores £36/20, £48/30 and £60/40; orchestral set: up to £36 based on size; all for whole loan period
Somerset	Free	1BL/CONARL per vocal set of 20; 2BLs/CONARLS per orchestral set
Swindon	1BL per set of 20	1BL per set of 20
Wiltshire	Minimum of 2CONARLS or 1BL per 20 items	Minimum of 2CONARLS or 1BL per 20 items

This table summarises the charges libraries make for direct loans to groups both inside and outside their local authority area:

Authority	Direct loans: local	Direct loans: non-local
Bath & NE Somerset	£25 for ≤20 parts £50 for 21 – 40 parts £75 for 41 – 60 parts	n/a
Bournemouth	£18 for orchestral sets/choral sets of 40 (then £4.50/10 thereafter); small vocal £6/set of 40 (then £3/set of 20 thereafter); no charge for chamber	n/a
Bristol	£18 for orchestral sets/choral sets of 20 (then £9/set of 20 thereafter)	n/a
Cornwall	Free for Cornish groups for Cornish stock but apply fees for ILLs: reservation charge of £6 in SWRLS (£12.05 non-SWRLS), postage of £7/20 vocal scores or orchestral set; fees of	n/a

Authority	Direct loans: local	Direct loans: non-local
	50p/vocal score/6 months and £10/orchestral set/3 months	
Devon	£6/month for orchestral sets £4/month for choral box or 10 vocal scores	£6/month for orchestral sets £4/month for choral box or 10 vocal scores
Dorset	£12/3 months for up to 40 copies of any set plus £2 request fee per set	Reciprocal arrangement with Poole so their customers receive same rates as left
Gloucestershire	£8/3 months for chamber music or set of 40 part-songs; £10/6 months for orchestral sets or set of 40 vocal scores; for ILLs, £15/6 months for orchestral sets; £20/6 months for set of 40 vocal scores	£8/3 months for chamber music or set of 40 part-songs; £20/6 months for orchestral sets or set of 40 vocal scores; for ILLs, £25/6 months for orchestral sets; £40/6 months for set of 40 vocal scores
Guernsey	£25/orchestral or vocal set for whole loan period	n/a
Hampshire	£25/orchestral or band set for 9 months; £12.50 for up to 120 vocal scores for 9 months	As left (but collections from Hampshire only)
North Somerset	£20/orchestral or vocal set of 20 for whole loan period	n/a
Oxfordshire	£26/orchestral set for 4 months; 60p/copy/4 months for vocal scores up to 5 minutes' length; £1.50/copy/4 months for vocal scores more than 5 minutes' length	£35/orchestral set for 4 months; £1.20/copy/4 months for vocal scores up to 5 minutes' length; £2.50/copy/4 months for vocal scores more than 5 minutes' length (customer collects)
Plymouth	£3.40/month for part-song or orchestral set box; £2.50/month per 10 vocal scores; chamber music is free	£6/month for part-song or orchestral set box; £4/month per 10 vocal scores for Devon customers; outside Devon, same charges plus postage.
Somerset	£15/orchestral set; £4 per 5 copies of vocal set	£17/orchestral set (+£3 postage); £4.50 per 5 copies of vocal set (+50p postage)

Authority	Direct loans: local	Direct loans: non-local
South Gloucestershire	£17 for orchestral or chamber sets; £17 for 20 copies of vocal set, then £9 for next 20 copies	As left
Swindon	£10/month for orchestral or vocal sets plus 70p reservation fee	n/a
Wiltshire	£30 for orchestral sets; £6 for chamber sets (for whole period of hire, normally 3 months); £17.50 for string and band sets; £1/copy for vocal scores and 60p/copy for part-songs/anthems	n/a

The charging structure for direct local loans is summarised by genre as follows:

Authority	Orchestral sets	Vocal sets	Chamber sets
Bath & NE Somerset	£25 for ≤20 parts £50 for 21 – 40 parts £75 for 41 – 60 parts	£25 for ≤20 parts £50 for 21 – 40 parts £75 for 41 – 60 parts	£25 for ≤20 parts £50 for 21 – 40 parts £75 for 41 – 60 parts
Bournemouth	£18 per set	£18 per choral set of 40 then £4.50/10 thereafter £6 per small vocal set of 40 then £3/20 thereafter	No charge
Bristol	£18 per set	£18 per choral set of 20 then £9/20 thereafter	n/a
Cornwall	Free for own stock: £10/3 months for ILLs plus postage and reservation fee	Free for own stock: 50p/copy/6 months for ILLs plus postage and reservation fee	n/a
Devon	£6/month per set	£4/month for choral box or 10 vocal scores	£6/month per set
Dorset	£12/3 months for up to 40 copies of any set plus £2 request fee per set	£12/3 months for up to 40 copies of any set plus £2 request fee per set	£12/3 months for up to 40 copies of any set plus £2 request fee per set
Gloucestershire	£10 for 6 months per set (£15 for ILLs)	£8 for 3 months per set of 40 part-songs; £20 for 6 months per set of	£8 for 3 months

Authority	Orchestral sets	Vocal sets	Chamber sets
		40 vocal scores (£40 for ILLs)	
Guernsey	£25 per set for whole loan	£25 per vocal set for whole loan	Not given
Hampshire	£25 per orchestral set for 9 months	£12.50 for up to 120 vocal scores for 9 months	£25 per band set for 9 months
North Somerset	£20 per set for whole loan	£20 per vocal set of 20 for whole loan	Not given
Oxfordshire	£26 per set for 4 months	60p/copy/4 months for vocal scores up to 5 minutes' length; £1.50/copy/4 months for vocal scores more than 5 minutes' length	No charge
Plymouth	£3.40/month per orchestral set box	£2.50/month per 10 vocal scores; £3.40/month per part-song box	No charge
Somerset	£15 per set	£4 per 5 copies of vocal set	Not given
South Gloucestershire	£17 per set	£17 for 20 copies of vocal set, then £9 for next 20 copies	£17 per chamber set
Swindon	£10/month per orchestral set or vocal sets plus 70p reservation fee	£10/month per orchestral set or vocal sets	n/a
Wiltshire	£30 for orchestral sets/hire period	£1/copy for vocal scores and 60p/copy for part-songs/anthems	£6 for chamber sets/hire period; £17.50 for string/band sets

3.3 Audiences and activity

In quantifying how much each of the services were used, we asked about subscribers or members of the service. Although the majority of libraries do not operate a subscription service, many require their users to join or register as members. Libraries hold their data in different ways; the following table details these, with highest figures highlighted in each category:

Authority	Subscribers	Registered users	No. of users (year)
Bath & NE Somerset	0	Not given	Not given
Bournemouth	0	Not given	64 (2016)
Bristol	0	40	25 (2016)

Authority	Subscribers	Registered users	No. of users (year)
Cornwall	0	167	117 (2015/2016)
Devon	0	80	Not given
Dorset	0	Not given	Not given
Gloucestershire	0	Not given	Not given
Guernsey	0	20	Not given
Hampshire	0	168	Not given
North Somerset	0	22	9 (2016)
Oxfordshire	194	See left	Not given
Plymouth	0	Not given	124 (2016)
Somerset	76	See left	Not given
South Gloucestershire	0	Not given	Not given
Swindon	0	3	3 (2016)
Torbay	0	2	2 (2015/2016)
Wiltshire	0	480	156 (2016)

This table details the number of direct customer loans during the most recent recorded year (loans equals sets unless specified otherwise):

Authority	Direct customer loans	Notes
Bath & NE Somerset	4	
Bournemouth	260	120 orchestral, 140 vocal/choral
Bristol	60	32 sets own stock, 28 ILL requests
Cornwall	304	41 orchestral, 263 vocal
Devon	287	96 sets own stock, 109 Plymouth, 51 SWRLS, 31 other ILLs
Dorset	111	31 orchestral, 80 vocal
Gloucestershire	110	
Guernsey	15	
Hampshire	803	
Jersey	0	
North Somerset	32	9 orchestral and 23 vocal (from April 2016)
Oxfordshire	Not given	17,451 copies loaned
Plymouth	124	Year to date: 235 in 2015/2016
Somerset	823	102 own stock, 721 ILLs
South Gloucestershire	29	
Swindon	24	Year to date: 33 in 2015/2016
Torbay	27	2015/2016 data
Wiltshire	Not given	12,177 copies loaned

This table shows the relative movement of interlibrary loans (ILLs), both outgoing and incoming, and gives the relative proportion of activity for incoming and outgoing ILLs within

SWRLS. Where an authority is a net ILLs borrower, they are shown in pink and where they are a net ILLs lender, they are shown in green. Highest figures are again highlighted:

Authority	Incoming ILLs	% SWRLS	Outgoing ILLs	% SWRLS
Bath & NE Somerset	4	50%	17	24%
Bournemouth	127	82%	439	37%
Bristol ⁸	49	84%	107	48%
Cornwall	367	47%	60	38%
Devon	Not given	Not given	23	74%
Dorset	173	84%	0	n/a
Gloucestershire	119	63%	38	53%
Guernsey	15	87%	0	n/a
Hampshire	437	31%	1,286	32%
North Somerset	54	76%	0	n/a
Oxfordshire	9,509 copies	10%	13,070 copies	13%
Plymouth	62	58%	1,809	70%
Somerset	159	58%	275	47%
South Gloucestershire	29	83%	0	n/a
Swindon	33	61%	1	100%
Torbay	27	100%	0	n/a
Wiltshire	174	71%	149	39%

For SWRLS members, with the exception of loans from Plymouth and other authorities who charge for ILLs (Wiltshire, Swindon), it is obviously more efficient to maximise the proportion of incoming ILLs from within SWRLS, whereas the higher proportion of outgoing ILLs outside SWRLS raises additional income.

3.4 Loan and reservation periods

Details of different authorities' loan periods have been summarised below:

	3 months	Up to 6 months	Not fixed
Core partners	1	3 ⁹	3
Regional stakeholders	2	2	7

It is to be expected that the regional stakeholders' loan periods are more likely to be bespoke, as they are often based on the loan arrangements of their suppliers.

In addition, we asked core partners about their reservation arrangements, and these have been summarised below:

	Notice required		Reservation possible
At least 2 months	1	3 – 6 months	1
At least 3 months	3	Up to 12 months	2

⁸ Bristol's ILLs data is for the 2014/2015 financial year, which is not the same year from which data was taken for the overall number of customers or loans (2016).

⁹ One core partner loans vocal sets for 6 months and orchestral sets for 3 months; this was counted here as up to 6 months.

Not fixed	3	Not fixed	4
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3.5 Customer access

We asked the seven core partners about physical access to their facilities. Of the seven respondents, only one respondent (Cornwall) still has stock fully accessible to browse to the general public, although two further services (Plymouth and Somerset) have individual copies for browsing. The remaining four services (Bournemouth, Bristol, Gloucestershire and Wiltshire) have sites requiring staff to access stock for customers.

Opening hours: the three sites open to some form of public access (Cornwall, Plymouth and Somerset) are open for 40 hours/week, 40 hours/week and 35.5 hours/week respectively.

Access online is varied and the usefulness of online access is largely dependent on how digitised the catalogue is, and the ability for customers to engage meaningfully with services online (e.g. make real time requests or check stock availability, process payments etc.). The following table summarises online resources for core partners:

	Browse catalogue	Current availability	Online payment	Manual staff input required
Bournemouth	Y	N	N	Y
Bristol	N	N	N	Y
Cornwall	Y	N	N	Y
Gloucestershire ¹⁰	Y	Y	Y	Y
Plymouth	Y	N	N	Y
Somerset	Y	N	N	Y
Wiltshire	Y	Y	N	Y

N.B. – this table details whether respondents’ online resources give current availability, which is not the same as being able to give details of future availability.

3.6 Library systems and processes

We asked all respondents about their library management system (LMS) and the results were varied, with the exception of members of Libraries West consortium, who have all moved within the last year to Sirsi Dynix. Of 18 respondents:

- 7 use Sirsi Dynix
- 5 use Talis Alto
- 5 use Galaxy by Axiell (of which 2 are soon moving to Spark by Axiell)
- 1 uses Spydus

¹⁰ Gloucestershire’s online system has been summarised by the authority as follows: “The request is placed via an Achieve form, which is our corporate system. The payment then goes through the Northgate Paris system which we use for card payments and this is linked to SAP, our finance system. The actual request is emailed to our ILL inbox.”

We also asked about additional bolt-on software used to manage the music set service. Of 15 respondents:

- 10 use no additional software
- 5 use a bespoke spreadsheet or database, primarily based on Excel

We asked further questions of the seven core partners about their catalogue, and the levels of manual work required to operate the music sets service. The two most developed online services (Gloucestershire and Wiltshire) have enabled the overdue reminders to be generated automatically, but all other processes (including subscription notices, where applicable, and administration relating to collection) by all respondents have to be undertaken manually. There are varying levels of catalogue sophistication for the remaining five core partners but all revert back to manual input by staff for real engagement, as none of their catalogues enable live availability.

3.7 Costs and staffing

We asked core partners detailed questions about their staffing and costs, although many found it difficult to provide consistent or full responses. The complexity of accounting for a non-statutory service that is commonly run alongside or as part of a statutory service was often at the heart of the incomplete data returns on costs. In many cases, specialist staff have been lost and library staff have been struggling to maintain effective customer service in the face of dwindling resources. In some cases, respondents were more optimistic about the changes they have made in response to external pressures, and have responded positively to counter the changes (e.g. by designing a bespoke database when the music specialist librarian was lost).

In total across the six core partners who were able to respond, the time spent by staff measured in FTEs (full time equivalent) was 6.23 FTE. The range was from 0.5 to 2.08, with an average (mean) of 1.07 FTE, although the median of 0.76 FTE is more reflective of the data. The vast majority of staff engaged by core partners have specialist knowledge or experience, either acquired formally (e.g. one library used to require all staff to have Grade 5 music theory) or through experience on the job. Where non-specialist staff are employed, they are normally working alongside a specialist or experienced staff member.

We asked core partners to break down the costs of operating the music service across a range of categories. Below is a summary of the aggregated results, including number of respondents, and the median response, to help counter the effects of any outlying data:

Cost	Total	No. of respondents	Median cost
Staff	£132,200.95	7	£18,763.68
Space/storage	£12,800.00	1	-
Stationery/admin	£1,317.65	3	£500.00
IT	£1,162.82	1	-
Transport ¹¹	£26,228.60	5	£4,500.00

¹¹ Transport costs were particularly difficult for respondents to calculate in a meaningful and easily comparable way. Some costs quoted by respondents were true costs to the service (i.e. they were not recovered through fees or

Buying music	£12,500.00	3	£4,500.00
Plymouth sub. ¹²	£12,361.00	4	£3,018.50
Other resources ¹³	£2,700.00	1	-

As another way of quantifying the cost of operating the service, core respondents were asked what they would save if the service was to stop tomorrow. The costs varied hugely, from a breakeven model to one costing more than £45,000 p.a. The total for six respondents was £116,847.03, or a median cost of £18,073.84.

Only one respondent generated any additional income through fundraising or Friends' events to support the service, estimated at just under £300 during the last year. Another service runs a Friends' group which does not generate income, and a third respondent will occasionally get small amounts of money or stock donations.

Finally, two of the 13 respondents had previously produced some limited advocacy data to help make the case for the service, for example by collecting audience statistics from users when returning sets. Wiltshire's data from 2011 was supplied, and was based on simple data collection asking customers to supply data on number of performances and audiences per performance. All respondents were enthusiastic about the idea of some relatively straightforward data collection to help make the case for the significant impact and the full audience benefiting from their music services.

4. Further consultation

I spoke to a range of people from different organisations to explore issues around music library provision including potential models for development elsewhere in the country, those facing similar issues and organisations with a strategic interest in the development of the service.

4.1 *Peer organisations*

Following the research and consultancy work that I undertook on behalf of Making Music for Nottinghamshire County Council in 2015, a new service was established in 2016 – the Nottingham Performing Arts Library Service (NPALS). The service has just won a national award for best local authority arts initiative, in recognition of the strength of the project.

- The new service included all of Leicestershire's stock coming to Nottinghamshire, in turn doubling available stock to current levels of 3,500 titles (68,000 copies)
- The development of NPALS own software was crucial to the project. This was made possible by £15k of IT investment internally, to create a bespoke and stand-alone software solution designed to automate many services previously undertaken manually by staff. As part of the software development process, every single title of stock was

customer charges) and others were only recovered in part. Rather than try to estimate the net cost to the service, I have just quoted the figures given by respondents for their transport costs.

¹² In addition to these subscriptions paid by the core partners, seven regional stakeholders gave details of their Plymouth subscription fees, totalling £16,917 or a median cost of £1,079.

¹³ This figure was quoted by the respondent for music binding costs.

added from scratch, which was more time-consuming than initially envisaged but crucial to ensuring the effectiveness of the new system. The software enables customers to see not only current but also future stock availability and helps with the strategic management of the service, by providing immediate information on areas including income and top titles. This also improves forecasting.

- The nine month review of performance shows that NPALS is close to achieving break even on staff costs, and its strong focus on marketing the service to potential users, including use of social media, means that it now has 250 user groups signed up, including some that were previously unknown to the service.
- The service is staffed with a dedicated staff member at 0.65 FTE (23 hours per week), supported by 0.32 FTE (12 hours per week) library assistant time, providing basic stock support.
- Customers now use the system to self-manage their own enquiries, check stock availability, make reservations and request ILLs. All payments are made online and although there were initially some concerns about this from users, this is now accepted as standard. Customer engagement has been crucial to the project's success.
- Pricing structure has been designed to be simple, with a separate cost structure for schools and education groups; pricing will be reviewed after two years but current pricing was benchmarked nationally with Surrey and others.

Stephen Chartres of NPALS suggested that there were very few things they would do differently if they were starting the process again. Beginning the project with a strong project plan and a proper business case was crucial, and the upfront investment in research (undertaken by me on behalf of Making Music) paid dividends, in that they were able to clearly address customers' concerns and needs, and build these into the development of the new system. Based on the findings of its commissioned research, customers in Nottinghamshire and Leicestershire were typically more concerned about availability of stock through ILLs, advance reservation and the logistics of set collection than costs. Nottingham is keen to roll out the system to other users nationally, and Stephen would be happy to have an initial conversation or meeting about this in the first instance. NPALS is keen to license its software, with a cost of £10k as a one-off fee for the license, then £3-4k per annum for maintenance.¹⁴

SEPSIG, the South East Performance Sets Interloans Group, was set up in 2005. The group consists of 11 library authorities in the South East (Bracknell Forest, East Sussex, Essex, Hampshire, Kent, Oxford, Portsmouth, Southampton, Surrey, West Berkshire, Wokingham) who each pay an annual subscription of £300. This money is then used to buy music sets housed in the top three lending authorities, based on the previous year's statistics, and members loan music and drama sets to each other for free, as well as sharing advice and knowledge. Hampshire collates statistics annually to support decision-making at the group's annual meeting. Charges have been discussed at previous meetings but the group has been unable to agree a common tariff of charges across different local authority boundaries to date. The

¹⁴ This compares favourably with the figures quoted by the (then) Yorkshire Music Library in 2015, who cited £10k annual charge by OCLC for using the system, access, support and attendance at the annual user conference. Yorkshire Music Library was forced to change its operation as its parent company failed (see <https://www.makingmusic.org.uk/news/former-yorkshire-music-library-relaunches>) and its collection has moved to Leeds Central Library.

group has also looked at transport providers together, in searching for a different courier. Quite a few authority members use Spydus as their LMS.

Norfolk Music Library was facing threat of closure in 2016 but following public protest, supported by Making Music and its local members, the Council agreed to keep the service open while other solutions were sought. In saving the service, the strength of feeling of customers was very important, and their presence en masse at a relevant Council meeting, galvanised by Making Music, made the difference. Friends of Norfolk Music Library were founded, with the aim of promoting the service and fundraising, and the group has been successful in raising over £5,000 during the first year. The Friends group (<https://normuslibfriends.wordpress.com>) has found it a difficult cause to fundraise for but the Council has so far been happy with the sums achieved. The Friends believe this solution can only be temporary, and that fundraising is probably only sustainable for up to two years, but that a longer term solution needs to be found beyond that. One potential way forward is for Norfolk to work with its LMS provider, Civica (Spydus) to develop an LMS-based software solution, and a development brief is currently being devised. The library's staff and Friends will soon be meeting to develop a strategy for the coming year. The library knows that relevant advocacy data collection will be important to them, and currently collects post-event data on an ad hoc basis from customers, including audience quotes.

4.2 Strategic stakeholders

Making Music is a key stakeholder whose members, numbering some 3,000 groups or 170,000 music makers, are the backbone of public music libraries' customer base. Its most recent data, from the Treasurers' Survey 2013, showed that 45% of its members use public libraries to source their music (compared to 27% each for music sourced from music publishers and elsewhere). On average, Making Music's performing members promote 3 – 4 concerts per year, attracting an average audience of 100 per concert, and each group has an average size of 55 members. An active lobbying organisation, Making Music (and Barbara Eifler, in particular, its Executive Director) has provided practical support and backing to many different local authorities in sustaining music library services. It is able to alert its members to developing situations and encourage them to directly lobby relevant local stakeholders, either in writing or in person. Making Music has offered unconditional help in collecting data or with consultations, and can help marshal the users' point of view and perspective on music library provision, which is often crucial.

SWRLS is well-placed to support the next stage of this work as it is currently finishing its own fundamental review and related changes in legal structure. Shortly to be set up as a CIO (charitable incorporated organisation), with amended objectives, its stated objects include "the advancement of culture by promoting access to specialist resources" and "promoting cultural activities and partnerships". As part of its object about advancement of education, the promotion of access to library collections and "specialist knowledge" is noted. SWRLS confirmed its willingness to offer additional seed funding to help provide match income for a future funding bid related to any outcomes and actions related to this report. SWRLS sees the publication of this report as the first step in reviewing how music fits in its own strategic direction.

Arts Council England recognises the hugely important role that music libraries play, particularly in supporting the amateur music making sector. ACE South West Relationship Manager for Music, Moragh Brooksbank, expressed concern about the retrograde step being taken by some libraries (e.g. Exeter) in losing both specialist staff and public access to music resources. She would be happy to support the next steps after the publication of this report, and suggested that both Katie Lusty, Relationship Manager for Libraries, ACE South West, and Brian Ashley, ACE's national lead for libraries, based in Nottingham, would be good contacts. A Grants for the Arts application might be a possible funding stream for a future bid, as might Heritage Lottery. She also suggested making a strategic alliance with other organisations with an interest in the future development of the service – for example, music education hubs, whose users will become the borrowers of the future. She suggests challenging authorities on their decision-making about music libraries: what signal are they sending to music makers if they continue to hold stock but make it inaccessible?

5. Conclusions and recommendations

Music library services across the South West are staffed and directed by committed and professional staff, who often work in the context of limited or reducing resources. Despite this, they are passionate and knowledgeable about the services they provide, and recognise the vital importance of the music sets service to a relatively under-recognised sector of the community. The research showed a patchy and inconsistent picture of resources, systems and approaches to the running of music sets services, perhaps exacerbated by the fact that the service is often seen as relatively insignificant in the face of other, larger and more demanding, issues for strategic managers.

The recommendations I make below relate to four key areas: charging; systems; advocacy and future development.

5.1 *Charging*

- A consistent approach to direct customer pricing across the region should help both save time and reduce border-hopping by customers. It may simply not be possible to gain a complete consensus by SWRLS members on pricing policy – and indeed, SEPSIG members have tried this previously and failed – but by attempting to align pricing policies where possible, not only would the system become fairer and more transparent to customers but it would also be a good first step towards a more cohesive regional solution in the medium term.
- The charging system amongst SWRLS members needs to be revisited as the current system is not understood by all and is perceived to be unfair by some. I would suggest that it is a good time to revisit the arrangements between libraries in the region to devise a system that is consistent, fair and robust - again, this should save time and the clarity would be much appreciated by many who simply don't understand why or how things currently work. Plymouth's current charging structure for other SWRLS members, whilst it makes historic sense given Plymouth's former role as the provider of the SWRLS music service, is simply out of step with the vast majority of other members. Some other services do make limited charges (in line with their charges to non-SWRLS members) for ILLs within SWRLS but equally, the logic of not charging within SWRLS is

not obvious given the anomaly of Plymouth's charges, particularly in view of the numerically larger holdings in Bournemouth and Somerset. Given SWRLS' own focus on its strategic direction and organisational development, this is a good time for the arrangements to be reviewed.

5.2 *Systems*

- With increasing pressures on most services, the current systems available to most music libraries in the region are woefully inadequate and rely upon significant manual work by staff. This has several negative impacts, including significantly slower processing time for each request and a related lack of management data to help develop the service more effectively. The problems found by respondents in answering very basic questions about their service's activities and audiences, for example, highlight the fundamental difficulties in the way many systems are currently run. Further, the heavy emphasis on staff administration time takes time away from staff being able to provide the specialist support that is so highly valued by music groups¹⁵. The development of an effective online regional catalogue, showing real-time current and future availability of stock, would make a huge difference to staff processing time and be a crucial step in establishing a viable regional hub model. Based on current consultation, some authorities may need a significant investment in staff time to create an accurate catalogue of their own stock holdings as the basis for this joint catalogue.
- Similarly, central investment in shared IT software, based on the regional catalogue, would enable libraries to shift the balance of work away from staff on a day-to-day basis and enable greater customer involvement in processing requests. The NPALS system has a strong emphasis on customers being self-service, freeing up staff time to deliver more complex and specialist tasks. Stephen Chartres at NPALS is keen to license NPALS' bespoke software and, assuming that local authorities are able to join together to meet the initial license fee and annual costs, it would seem to be a sensible first system to explore, given that the investment in the software has already been made by Nottingham and that it is a tried and tested system. The South West would need to be mindful of any data protection issues related to having customer data held on another server, for example, but the costs of running the service compare favourably to other bespoke software systems (e.g. OCLC in Yorkshire) and if a joint license is possible, these costs reduce considerably.

5.3 *Advocacy*

- Data collection by SWRLS members should be prioritised in order to help make crucial advocacy arguments for the service. I recommend that a simple system be employed as soon as possible by members; even very basic data collection could provide very

¹⁵ The Making Music report for Nottinghamshire showed that service users highly valued the availability of specialist staff, even for limited periods. This was particularly strong from the focus group research conducted as part of the research.

quick wins for the service, including a simple pro forma for data collection on return of sets (i.e. like that employed by Wiltshire – simply to link the sets borrowed to the number of performances and the number of audiences per performance). There was universal enthusiasm for this suggestion when I was consulting with respondents. I have devised an example of a pro forma for data collection in Appendix 2. Similarly, the collection of basic data about service users (e.g. the number of members each group has) will enable a fuller and more compelling picture of the impact the service has on its local communities. If the same format is used for data collection across the region, the South West would be able to make claims for the impact of its regional music services very effectively¹⁶.

- Additional qualitative data in the form of audience and user feedback would also be very valuable in painting a picture of the real impact of the music sets service. The pro forma example at Appendix 2 shows this incorporated in the form but if this is felt to be too onerous for customers, qualitative data could be collected less frequently, perhaps, by simply having a place to log customer comments and feedback on the performances or the musical encounters that the sets service provided.
- Respondents really struggled to provide solid data on the real costs of operating the service, and the limitations of the data presented have been discussed above. It is recommended that an agreed and workable solution to quantify and record the costs of the service is developed by the region, so that when the region needs to speak individually or together for the survival or development of the service, the language and methodology is consistent and clear. Clarifying the real costs of running the service will help hugely in determining the relative value for money in investing in joint software, for example, and will enable the region to make effective invest-to-save arguments for the service at a local level.
- Another simple and immediate suggestion is for respondents to agree a form of credit with users, if they haven't already, to ensure that the music libraries' work is being acknowledged appropriately on concert programmes or ensembles' websites. Again, this is included in the pro forma at Appendix 2. This simple step will help raise the profile of a relatively invisible – if essential - service.

5.4 *Future development*

- Use collected quantitative and qualitative data to provide an evidence base for the impact of regional music sets services, so that they are recognised as an effective community resource. Demonstrate how the music sets service delivers the first listed outcome – cultural and creative enrichment - of the vision for public libraries, set out in the Libraries Taskforce's strategy document: "libraries... encourage individuals to explore different cultural experiences and create things themselves" leading to "increasing attendance and active participation in creative arts by people of all ages and

¹⁶ In the meantime, SWRLS collectively - or local authorities individually - may wish to make use of Making Music data to provide a 'quick and dirty' data solution, which will provide approximate numbers for impact. The most recent figures available from Making Music are referenced in section 4.2 above, and could be used with individual loans and customer data to provide estimated extrapolated data, showing estimated total audiences, events and participants.

backgrounds¹⁷, as well as other outcomes such as happier and healthier lives, and stronger, more resilient communities.

- Identify partners for strategic alliance; as noted above, Making Music is a highly effective but often untapped resource. Barbara Eifler is extremely knowledgeable and passionate about the role of music libraries nationally, and has offered unconditional support in data collection or consultations on behalf of Making Music. Making connections with those responsible for youth music provision in the county, including regional music education hubs, will involve the next generation of music users and will also connect with parents. Representatives of the regional music education hub were also extremely vocal in standing up for Norfolk Music Library. The regional and national ACE contacts for libraries, Katie Lusty and Brian Ashley (<http://www.artscouncil.org.uk/users/brian-ashley>), should be included.
- Consider creating a summit of stakeholders to get local decision makers together as a consortium, both from within and outside the region. Given the politics involved in any longer-term regional solution, it will be important to start identifying and lobbying local authority decision makers with a clear message about the role music libraries play in developing and sustaining stronger communities.
- Liaise closely with other services about their parallel situations – e.g. the ongoing discussion about LMS software development in Norfolk – and share knowledge on the South West’s current findings and planned actions. Partnership, networking and knowledge sharing within and outside the region will continue to be crucial to finding an effective regional solution to help deliver a sustainable service into the future.
- In the longer term, and presuming effective joint software enables a real-time flow of information about regional stock, the South West may wish to consider creating a regional hub model where stock is concentrated in a smaller number of locations and resources are focused in those areas, much as SEPSIG’s model focuses resource allocation on the top three lending authorities. From a national perspective, even without shared software, the concentration of UK-wide stock in a smaller number of regional collections will simplify and streamline everyone’s work, joining the dots and helping to provide a more effective service for the nation’s music makers.

¹⁷ p23 5.1, *Libraries Deliver: Ambition for Public Libraries in England 2016 – 2021* (Libraries Taskforce, 2016)

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- Plymouth Libraries *Plymouth Music Service SWRLS paper* (September 2014)
- Wiltshire Libraries *2011 Performing Arts Audience Survey* (2011)

Appendix 1: List of consultees

Kat Aveyard	Senior Library Assistant Central Library, Bath and North East Somerset Council
*Jill Barker	Operations and Development Manager, Gloucestershire County Council
Colin Bray	Service Development Manager Health & Well Being, Libraries Unlimited, Devon
Moragh Brooksbank	Relationship Manager Music, Arts Council England South West
Stephen Chartres	Performance & Improvement Manager Sport and Culture, Nottingham City Council
*Sue Crowley	Strategic Manager Library Services, Somerset County Council
Alison Cudmore	Assistant in Charge Torbay Libraries, Torbay Council
Tracey Dowling	Stock Librarian, Swindon Libraries and Information Service
Julie Edyvean	Stock and Contracts Manager Libraries, Hampshire County Council
Barbara Eifler	Executive Director, Making Music
Lorna Everett	Customer Adviser Music Service, Gloucestershire County Council
Kath Griffiths	Locality Manager Norfolk and Norwich Millennium Library, Norfolk County Council
Tony Hollick	Music Librarian, Plymouth County Council
Anne Hooper	Stock Manager, Bristol City Council
Sharon Jones	Principal Librarian Information Services & Reference, Jersey Library
Isabelle Kleinknecht	Music Librarian, Oxfordshire County Council
Peter Lawson	Friends of Music Library Norfolk
Shelagh Levett	Director, South Western Regional Library Service
Tracy Long	Dorset Library Service Manager, Dorset County Council
*Amanda Macdonald	Service Manager Libraries, Plymouth County Council
Jane Mason	Reader Services Manager: Adults, Oxfordshire County Council
*Barry Meehan	Specialist Services Librarian, Bournemouth Borough Council
Elaine Mellor	Lead Librarian Development and Environment, North Somerset
Ellie Miles	South East Performance Sets Interloans Group (SEPSIG)/Surrey PAL
Laura Milligan	Chief Librarian Guille-Allès Library, Guernsey
*Linda Moffatt	Stock and Support Services Team Leader, Cornwall County Council
Chris Moore	Library Operations and Development Manager, Wiltshire Council
Kate Murray	Head of Libraries, Bristol City Council
Robina Prince	Bibliographic Services Co-ordinator, South Gloucestershire Council
Gill Tristram	Stock Manager Broadstone Library, Borough of Poole
Alan Watts	Library Assistant Performing Arts Library, Wiltshire Council
Mandy Winter	Library Supervisor Performing Arts Library, Somerset County Council

* indicates steering group membership

Appendix 2: Sample data collection pro forma

Thank you for borrowing music sets from ABC music library. We ask that you credit us on your concert publicity and on your website as follows:

'Music supplied by ABC music library, www.abcmusiclibrary.gov.uk'

Please complete this form and return it with your music – the data you supply will only be used in aggregated form, so will not be used to identify your organisation individually.

Your organisation name:	
Number of members:	
Music borrowed:	
Number of performances:	
Audience numbers per performance:	
TOTAL AUDIENCE:	

If you received positive comments from audience members, press or members on your concert, or if there anything else you wish to tell us about your event, please note it here:

Please help us to spread the word about the music sets service we offer at ABC music library and thank you for taking the time to complete this short questionnaire: your data will help us to keep the music service available for future users. Thank you!