

The Application of a Performance Measurement Model in the Management of a Heritage Organisation: A Case Study of Morwellham Quay and Copper Mine

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Following graduation, my first jobs were in a music studio and helping to establish the National Federation of Music Projects. This led to my appointment as Research Fellow with Southern Arts in 1988 and to the academic post of Lecturer in Arts Management at Bournemouth University before joining Marjon in 1993 where I teach and research in the areas of sport, leisure and culture.

Abstract

This paper reports the attempt to apply a strategic model of arts management to a heritage organisation from a research process spread over a two year period. The central concerns of the paper lie with the usefulness of the model as originally detailed in the International Journal of Arts Management (1999) with a particular focus on the value of performance data in the running of the site and in reporting to interest groups. The paper reports favourably on a number of features of the model and its associated indicators but less favourably on the distinctions between education and service quality. Attempts to 'balance' the pursuit of particular objectives were found to be unhelpful and abstruse.

Keywords

Heritage, performance, evaluation, strategic, management.

Introduction

This paper is one of the outcomes of a set of related research projects that apply a range of marketing and management approaches to an organisation that is in decline or in a period of transition. The projects were conceived and developed with members of the managerial team of 'Morwellham Quay and Copper Mine' with the related aims of producing a series of discussion papers on the future management and marketing of the site. This paper focuses on the research project designed to apply a model of strategic management for cultural organisations. The aims of the project were to develop and apply a valid and reliable management information system.

To achieve these aims, the strategic model, first presented by Gilhespy (1999) and described as comprehensive by Towse (2001) was adopted. The model was first put forward with two related contentions. These were that 'the objectives of cultural organisations may be rendered down into a number of strategic options....and further, that the achievement of these strategic options may be measured with a degree of sensitivity' (Gilhespy, 1999 p.38). A representation of the model may be seen in Appendix 4. This paper reports the findings of a long-term case study that assesses the veracity of these contentions. The paper goes on to evaluate the usefulness of the model in providing the basis for improved management information and decision-making. To assess the two main contentions the researcher in discussion with the management team of the heritage site identified a number of research questions.

Research Questions

- Does the application of the model lead to an increase in the clarity of policy objectives?
- Does the use of the model lead to an increase in the congruence between policy objectives and the strategic choices made to implement the policy objectives (which is to say in the allocation of resources)?
- Is the quality of management information improved (and, if so, can the information be used for advocacy purposes such as supporting bids for public or private support)?
- What are the key constraints on achieving the stated objectives?
- Are the performance indicators sensitive in measuring the policy objectives?
- Is the increase in planning cost-effective?
- Does the weighting system work?

Background to Morwellham Quay and Copper Mine

Morwellham Quay is a 'recreation of what life and work were like at a small industrialised quay during the 19th Century' (Patrick, A, 1990). The site is set in an Area of Outstanding Natural Beauty (A.O.N.B.) in the Tamar Valley, the River Tamar forming a natural boundary between the English counties of Devon and Cornwall. The designation of A.O.N.B. in Britain restricts certain forms of development and encourages environmental conservation and recreational use. This navigable river offered the opportunity for the trading of tin, copper and arsenic. One hundred years prior to its restoration the Quay enjoyed the peak of its commercial activity as one of the most significant ports of the Victorian era in spite of its position some 14 miles inland from the sea. Booker (1967) has noted that the origin of the existing site may be identified as 1817 with the completion of the Tavistock canal. The peak of the Quay involved the mining, assessing and the transportation of a variety of minerals and aggregates although tin and arsenic were two of the main products. The decline of Morwellham Quay may be identified as 1859 with the completion of the railway linking Tavistock to Plymouth. Trade was lost to the railway and the canal abandoned in 1873. More significantly, the Devon Consol mine failed in 1880 and by 1886 the quays were abandoned too. The diaspora of the miners meant that Devonian and Cornish place names are widespread in Australia and Tasmania. Although some residences continued on the site, the rural isolation of the quays meant they were never redeveloped or used for any alternative purpose until the quay was rediscovered and recovered from the encroachment of brambles in the late 1960s. The lack of re-development is one of the more distinctive features of the site. The site is now run as a trading organisation with charitable status and is dependent on its revenues from visitors as well as educational visits from groups of secondary schoolchildren in the main although some tertiary visits are also made. Although the site has much in common with organisations with public and merit good status in terms of educational and conservation functions the site has never been in receipt of regular public support.

The site may be regarded as failing according to the few performance indicators that the management of the organisation have available to them. Crucially, the site has been losing money and laying off staff. Visitor numbers have been in decline from a peak of 170,000 to approximately 50,000 for each of the years from 2001 to 2004. Nevertheless, the significance of the site has been recognised given that it forms the critical component of a bid for World Heritage Site status (The Cornish Mines Bid, 2004).

Research Methods

The research had a number of stages. The first stage used a semi-structured interview schedule with key personnel in the organisation. A series of interviews were conducted and supplemented by the analysis of in-house documentation as well as consultancy documents (Pilbeam, 2003; Ekos Consulting, 2003). The purpose of this stage of research was to situate Morwellham Quay within the policy matrix that forms part of Gilhespy's strategic model (Appendix 4). The matrix lists the policy objectives available to the managers of organisations in the cultural sphere broadly defined as including the arts, museum and heritage sectors. For any one organisation only some of the objectives are relevant and to varying degrees of importance. This stage of research led, first, to the identification of management priorities and, second, to a series of relevant performance indicators.

The second stage of research consisted of generating data for the performance indicators. These data were generated from a combination of in house information and from consumer-based research. Over a period of two years, a random sample of on site visitors and past visitors were questioned about their experiences of visiting this heritage site. The off site visitors were interviewed in the nearby city of Plymouth in order to capture information on post-purchase satisfaction. The questionnaires consisted mainly of closed questions although there was some provision for respondents to offer more open-ended commentaries.

A third stage of research ran in parallel with the second. This consisted of a series of meetings with key personnel at the site to ascertain their views on the usefulness and reliability of the performance indicators.

Performance Indicators Defined

Performance indicators (P.I.s) are used in commercial, public and voluntary organisations both to monitor the achievement of organisational objectives and to provide information for advocacy purposes. This means they may be used as evidence for the efficacy of public or private support. Uzzell (1989) made this observation about the use of P.I.s in the heritage sector:

“Almost without exception, commercial enterprises set targets to which to aspire. Although the conventional indicators of the market place, such as profit, are not necessarily present or appropriate to provide a measure of success (and failure) of interpretative performance, this is no reason why public sector or non-profit making facilities cannot equally set measurable targets.”
(Uzzell, 1989 p.7)

P.I.s incorporate the usual requirements of standard accounting procedures and may go further to measure a range of strategic options. P.I.s may be qualitative or quantitative. This paper mainly focuses on the uses of quantitative indicators, usually expressed in the form of ratios.

The analysis is based upon a model for measuring the performance of cultural organisations (Gilhespy, 1999). The model presented in detail by Gilhespy (1999, 2001) makes the working assumption that a strategic orientation is desirable for organisational effectiveness. In the commercial sector, strategic methods are claimed to be means of rationalising operations in order to improve efficiency and effectiveness and to maximise outcomes in relation to objectives (Wilson and Gilligan, 1997). Hudson (1995) makes the same claim for the third or voluntary sector. And in the subsidised cultural sector of Britain too, the need to provide evidence for the

effective use of public resources has led to the increased use of performance indicators. Evans (1999) describes these forms of performance evaluation as symptomatic of the 'emergence of a new managerialist culture', a culture that includes the 'language of marketing and the business plan (SWOT, PEST, market segmentation/niches, ticket yields, capacity, price discrimination)' (Evans, 1999).

Comparison is at the heart of performance measurement. Comparison can be conducted over time (i.e. past performance), against targets or against similar organisations. The first two of these are within the remit of this paper. The analysis that follows includes some special terms. These are detailed in Appendix 3.

Analysis

The application of the strategic model begins with a mapping process. This process allows organisations to identify their priorities using a policy matrix (Appendix 2). This matrix provides the structure of the analysis section. The performance indicators are highlighted in tables and discussed using the criteria of appropriateness and sensitivity. The policy objectives of diversity and innovation were viewed as inappropriate to the management of the site and are not addressed in the analysis.

Access Maximisation

Access maximisation was identified as a key priority for the Quay: '...one of the key aims of the Quay is getting different groups in...it is about ordinary people ..and getting ordinary people in..'. This was related to the character and purpose of the historical narratives and representations on offer. It offers and redresses the history of working people in the South West during the boom period of mining and 'marks us out as different from the (National) Trust sites' (a reference to Lanhydrock, Saltram House, Anthony House and Buckland Abbey). Notions of access were linked with the presentation of an historical site that offers as an alternative or a critique to representations of the past that focus on the aristocracy and the country house.

It was noted that: 'we do not have a good set of measures to evaluate this at present'. Notions of access have underpinned the 'welfarist' approach to a great deal of the cultural provision in Britain (Coalter, 1988) and this is often measurable through a pricing structure that differentiates visitor groups. There is no regular public support for the Quay and no such pricing structure. Moreover, the concern with access is to maintain a version of history in which ordinary people may recognise themselves and their forebears. This version of access links to the objectives of education and social cohesion.



Table 1: Access Maximisation

Performance Indicator	What is being measured?
Students/Total Attendance	Effectiveness
Children on School Visits/Total Attendance	Effectiveness
Concessions/Total Attendance	Effectiveness
New Visitors/Total Attendance	Effectiveness
Social Grade A to E/Total Attendance	Effectiveness
Local Users/Total Attendance	Effectiveness
Regional Users/T.A.	Effectiveness
Tourists/Total Attendance	Effectiveness
Age Bands/Total Attendance	Effectiveness

The on site and off site surveys produced data on social composition and age bands. In these surveys exactly 50% of all visitors were under the age of 19 largely from formal educational visits. Other visitors were spread across the age bands although only 13% of visitors were over the age of 50 (with only 3% being over 65). Exactly three quarters of 'non-school' visitors' were new visitors. The social composition of the visitors wasThe results of the surveys were almost identical for the two separate years in which they were carried out.

The indicators are robust and allow for interpretation. The bulk of the data is not costly to produce although the production of data on social composition is time consuming. The indicators may be used for comparison and, crucially, for target setting. The aim of reaching ‘ordinary people’ may be seen inThe proportion of repeat visitors may highlight a failure in the take up of the ‘loyalty scheme’ available for repeat visitors who are local to the site.

Data are available on the social composition of visitors to museums and heritage sites at a national level. The indicators, therefore, may be used for comparison and benchmarking against national averages as well as for comparison of longer-term targets.

Attendance Maximisation

Measures of overall attendance have been one of the few performance indicators in regular use. They provide one of the key indicators of decline. Realistic targets for growth may be established with the expectation that peak levels will not be reached again given the growth of competing attractions in the area.

Table 2: Attendance Maximisation

Performance Indicator	What is being measured?
Total Attendance	Effectiveness
Total Attendance/G.O.E.*	Efficiency
T.A./Capacity	Efficiency
Expected Attendance/Actual Attendance	Economy

Economy Maximisation

In essence, this objective is about doing things as cheaply as is possible. The interviews indicated this as a necessary requirement particularly given the straitened circumstances of the site. The P.I.s in Table 3 offer a means of differentiating costs against turnover and may become helpful in making managerial decisions.

Table 3. Economy Maximisation

Performance Indicator	What is being measured?
Publicity Costs/Turnover	Economy
Premises Costs/Turnover	Economy
Maintenance/Turnover	Economy
Admin.Costs/Turnover	Economy
Salaries/Gross Expenditure	Economy
Planned Costs/Actual Costs	Economy



Education/Conservation

For organisations in the cultural sector, the term education may have a wide range of meanings. Education, narrowly defined, may include the provision of classes, workshops and possibly outreach provision as well as the development of life skills and social confidence more generally. At the Quay the use of the term is more expansive, applying to the leisure visitor as well as the formal elements of the educational spectrum. In attempting to reach 'ordinary people', the educational work of the Quay is concerned with the re-distribution of cultural capital. The educational activities of the Quay constitute a means of pursuing social equity. For the Quay, the pursuit of educational goals and revenue maximisation are complementary.

Education is also the rationale underlying the conservation activities of cultural organisations. The conservation of the Quay creates opportunities for education and cultural consumption for future generations to relish the opportunities that we enjoy, a form of intergenerational equity. This is cultural sustainability. There are technical problems for any performance measurement system when attempting to measure the benefits to future generations. In the absence of any specific timescale, the designation of targets is unclear.

The measurement of the number of educational visits may not be a measurement of whether any education is actually taking place. These quantitative indicators may fail to capture the subtle and complex processes involved in education. The research provided substantial evidence of customer satisfaction with the site. The responses for service quality maximisation are realistic. They measure the extent to which the expectations of visitors have been satisfied or even exceeded. However, the provision of education elicits a much wider debate concerning the extent to which the attitudes and behaviour of visitors are affected either during their visit or in the longer

term. This problem needs to be conceptualised in two ways. The first is whether and to what extent visitors to the site have a motivation to be educated. The second is whether and to what extent any education has taken place. It is also inappropriate to treat all visitors as being alike. Tunbridge and Ashworth (1996) have argued that this is not the case. Although there are some generalities that may be put forward about the 'heritage visitor' in relation to their social and educational background, their ability to spend, and the likelihood that they will be visiting without children, Tunbridge and Ashworth argue that the heritage visitor is; '...more heterogeneous, the trip more varied, and the attitudes towards the past more complex than such generalised descriptions suggest'. (1996, p.63).

For the first question, a discussion of education may be instructive. For Harris, 'Education has become defined almost exclusively as something that specialist educational institutions provide, and the ways in which they provide them has been affected by a view that education is for something else – for qualifications, for work' (2005, p.63). He goes on to argue that the role of leisure organisations in providing education may, thus, become neglected but as Ruskin argues: 'Education must be planned in the light of recreation needs as there is a logical relationship between recreation and education' (2003, p.137). People who have gone through a formal educational system may continue to be motivated by a need or want to learn about themselves, their history and the histories of others. The literature from leisure studies refers to this sort of leisure activity as serious leisure (Stebbins, 2004, p.455). Serious leisure is often associated with voluntary forms of leisure rather than in the leisure opportunities provided by the commercial sector. However, as Taylor and Gratton(2003) have noted, commercial leisure may meet all sorts of personal and social needs.

The second question is whether education taken place. A trading heritage site offers opportunities for learning to take place. The site is not managed with objectives expressed in the language or with the ideology of learning outcomes that have become common in the formal education sector. To the extent that educational goals are clear, they are expressed with the passionate belief that the site provides an historical narrative that is dissonant with mainstream history(ies) as the site highlights the lived experience of ordinary people. The narrative(s) is one of exploitation, of lives of hardship and struggle. One of the key features of the visitor experience of the Quay is an uncomfortable train ride into a disused mineshaft that is both literally and figuratively chilling.

This raises the question of the extent to which it is appropriate to impose on people, particularly in their leisure time. A division needs to be maintained between education on the one hand and customer satisfaction on the other. Service quality is one of the objectives of the matrix. The customer research provides robust evidence that satisfaction is experienced and that visitors feel that they gain value for money. Satisfaction, for instance in the SERVQUAL model, is treated as a function of experience meeting expectation. And yet, education may be concerned with confounding or disturbing expectations. Measuring the impact of education implies a long-term process requiring subtle forms of investigation into motivations and expectations. This works on both sides of the coin. For the curators and site designers, the educational goals of the site need to be expressed more precisely. For the visitors, research into attitudes and motivations (and behavioural change) may be necessary. Harrison and Shaw (2004) have written on satisfaction in marketing terms noting that satisfaction leads to repeat purchasing behaviour and spreading word of mouth positives But what of education itself? For Harrison and Shaw education is discussed as a variable in the rating of satisfaction. A distinction may be made between customer-derived notions of satisfaction and definitions derived from management. The satisfaction of managers may derive from evidence that visitors have learnt something from their experience and even that visitors may change their attitudes and behaviour as a consequence. If the motivations of visitors differ then consumer-derived measures of satisfaction will also clearly differ from those of the

providers. Soren (2000) has noted the following when writing about museums and their objectives:

‘...performance indicators normally are reported as statistics, ratios, costs, or other ways of measuring a museum’s progress in achieving the aims of the museum, they do not tend to include reference to the quality of the visitor experience. If performance measures are developed in alignment with meaningful organisational missions and goals, they can help to clarify priorities and manage for change.’
(Soren, 2000 p44)

A solution to this problem of ‘alignment’ may have to be required if the site gains public subsidy. Morwellham Quay and Copper Mine may become a major recipient of subsidy through the auspices of the Heritage Lottery Board and through UNESCO if the Cornish Mines Bid is successful. The question arises of how to manage this subsidy and how to prove the appropriate use of public money. As Towse (1993) notes this is the fiefdom of cultural economics. One of the principal criteria for the use of public money through the Heritage Lottery Board is that the support received has to be used for educational purposes. This leads to the need for specific performance indicators for the objective of education in order to provide evidence that the public money is being well spent. This assumes, of course, that the educational goals of the supporting agencies are clear and measurable too.

Table 5. Education

Performance Indicator	What is being measured?
Educational Expenditure/ Programme Costs	Effectiveness
Educational Expenditure/ Gross Operating Expenditure	Effectiveness
Outreach Costs/Programme Costs	Efficiency
Outreach Costs/G.O.E.`	Efficiency
No.of Educational Visits	Effectiveness
No.of people on Educational Visits	Effectiveness
No.of people on Educational Visits/ G.O.E.	Efficiency

Quality

The objective of quality may be evaluated from a number of perspectives including those of the management team, visitors and external agencies. In the original research for the composition of the policy matrix, the objective of quality was included for those cultural organisations with a significant dramatic or performing dimension in their programming. Although there are elements of dramatic performance in the presentation of the site (site workers in costume, the drama of the ride in the mine etc) as well as entertainment evenings (jazz, for instance) the site differs from a theatre or performing venue. Nevertheless, visitors to the site are engaged in processes of judgment that are misrepresented in the quantitative indicators listed in Table 6. This misrepresentation has led to a related research project that focuses on the visitor as s/he

experiences their visit and uses participant observation as its primary research method and will be reported in a separate paper.

Table 6. Quality

Performance Indicator	What is being measured?
Estimate of Lost Revenue	Effectiveness
Estimate of Lost Attendance	Effectiveness
Quality Ratings (Using Social Surveys)	Effectiveness



Revenue Maximisation

This objective was measurable using the indicators shown in Table 6. The indicators were robust and appropriate and offer scope for target setting.

Table 6. Revenue Maximisation

Performance Indicator	What is being measured?
Direct Income/G.O.E. Economy	Economy
Educational Income/G.O.E.	Economy
Sales Revenue/Turnover	Economy
Business Support/Turnover	Economy
Sales Revenue/T.A.	Efficiency
Administration Costs/T.A.	Efficiency
Gross Expenditure/T.A.	Efficiency

Service Quality Maximisation

The provision of cultural opportunities is a complex good. The provision is made up of a series of tangible and intangible elements. The service quality features of this complexity may be evaluated from the perspective of the customers using surveys of customer satisfaction. Visitors were surveyed at he Quay on the features of the site using Likert Scales. Across the two years of the surveying, the features of the site were consistently rated as either good or excellent by around 80% of the visitors with the remaining 20% offering no view. The same results derived from the question concerning the attempt to create a 'Victorian atmosphere'. Three of the features (the wildlife reserve, mill pond, and play area) were rated as average by 5% of respondents. Only one respondent assessed anything as either 'poor' or 'very poor' during the period of study. Three quarters of the visitors rated the site as good or excellent in offering value for money. The remaining quarter rated this as average with no responses in the negative categories. The open-ended questions produced a variety of comments on the tidiness of the site and car park but nothing that constituted a consistent pattern of response. Overall, the on-site surveys generated very positive opinions of the site. The off site surveys generated similar figures in relation to satisfaction although a high proportion of the people surveyed in Plymouth had been to the site as and educational trip rather than as leisure visitors. There were no strong differences in the results between leisure visitors and those who had been on school visits. Also, there were not significant differences in the results when analysed in relation to social grade.

The survey information was easy and inexpensive to produce although the information on social grade proved time consuming to conclude. However, it may be the case that the surveys are measuring satisfaction rather than quality, a point taken up in the conclusion.

Table 7. Service Quality Maximisation

Performance Indicator	What is being measured?
Quality of Buildings and Fabric: Bars; Restaurant; Car Parks; Seating.	Effectiveness
Quality of Sales Products: Food; Drink; Shop Sales.	Effectiveness
Quality of Service Elements: Efficiency of Staff; Friendliness of Staff; Friendliness of Volunteers; Cleanliness of Building.	Effectiveness
General Features: Atmosphere Sense of Community Value for Money	Effectiveness Effectiveness

Social Cohesion

Social cohesion is one of the more intangible policy objectives that the management of a cultural organisation may choose to pursue. Aspects of social cohesion include as a sense of community, multiculturalism, the nurturing of cultural democracy or the encouragement of understanding amongst a range of social groups. The managers of the Quay linked the objective of social cohesion to education, in particular, in that people from the locality or region may be given a sense of their own history and identity. The provision of the 'loyalty' scheme (for a small sum in addition to entrance fee local people may re-visit as often as they please in the year following their first visit) may be regarded as a form of price discrimination that operationalises this objective. The data indicated the failure of this initiative and pointed towards either its withdrawal or for its greater promotion.

Table 8. Social Cohesion

Performance Indicator	What is being measured?
No.of visitors using 'loyalty' Scheme	Effectiveness
Expenditure on community-oriented activities/Gross Expenditure	Efficiency
Attendance of community-oriented activities/Total Attendance	Effectiveness/Equity
Attendance by Social Grade/Total Attendance	Effectiveness/Equity
Number of Volunteers	Effectiveness/Equity

Discussion

The first research question focused on the usefulness of the model in clarifying policy objectives. The matrix of objectives proved to be a useful tool in the separation and clarification of organisational objectives although the distinction between education on the one hand and social cohesion was problematical. From the interview schedules, it was clear that the supply of historical education was, ipso facto, a contribution to social cohesion.

The clarification of objectives is intended to contribute to a greater strategic orientation in the management of the site and, significantly, lead to the specific and accountable use of resources to achieve particular objectives. However, the model makes a number of assumptions at this point both about the decision-making process in an organisation and about the culture of management as a whole. It is assumed that a decision-making process takes place with definite outcomes and probably in a hierarchical structure with clear lines of accountability. In this case study the management structure was flat and non-hierarchical (although this changed during the course of the research with the appointment of an overall Director) with a board of trustees providing some direction. Although the exploration of this was not entirely within the remit of the project, it would appear that a structure that would facilitate a robust decision-making process had not been in place for some time. This leads to an answer for another of the research questions: the increase in planning is not cost-effective, at least in the short-term.

The increase in planning may become cost-effective when the major funding agencies begin to require management information for monitoring purposes. All organisations have a number of interest groups. These interest groups may require management information for advocacy and monitoring purposes. Some of the indicators should be of use to upstream stakeholders such as funding bodies, local and regional councils, the Regional Development Association and the Area of Outstanding Beauty (A.O.N.B.) for the Tamar Valley. The site has recently developed a number of positive partners in the forms of local authorities and the A.O.N.B., partners that may generate lucrative funding as well as being a partner in the bid for World Heritage Site status. This status is only conferred if organisations have management plans:

'Each World Heritage Site is required to have a management plan, which outlines its policy towards conservation, visitors and local issues...it is recognised that the management of World Heritage sites requires a diversity of approaches..'
(Smith, 2003 p.110)

The indicators outlined in this paper are appropriate to measure elements of this policy framework although, as it has been noted, the discussion of education and service quality needs to be treated with sensitivity.

A further research question focuses on the weighting system. This is a means of balancing the objectives against one another. This balancing process was found to be abstruse and of no practical value.

The application of the model operates at the internal management of the site. The running of the site also has to be placed in a broader context, one that recognises the external environment in which the organisation operates. A plausible contention is that the decline in visitor numbers and profitability may be explained with the analysis of competitors. In Britain, the advent of the National Lottery in 1994 has had a major impact on the supply of visitor attractions. The regulations established for the distribution of lottery grants to the arts, sporting and heritage sectors were heavily skewed towards investment in infrastructure in the first five years of its operation (White, 1999). Many new facilities are in operation. In the sub-region of the South West, Lottery funding has provided the Plymouth based National Aquarium, the National Maritime Museum in Falmouth as well as the Eden Project. All three are within one hour drive time to Morwellham Quay. The National Trust has also invested heavily in its Buckland Abbey site which is nearby. Leisure Consultants (2003) have claimed that this sort of growth is unsustainable against the growth in leisure spending and the demand for days out, whether these are visitors or tourists.

This contention rests upon the assumption that the demand for attractions such as the Eden Project is the same as the demand for heritage visits. For Burton and Scott (2003), the assumption is realistic given their claim that leisure choices are indicating elements of postmodernity. The museum and heritage visitor is blurring with the leisure visitor if, indeed, these types were ever distinct. The quest for authenticity remains but may be experienced in a number of leisure forms including cultural texts with realist features and naturalistic art forms. One of the many challenges facing the managers of Morwellham Quay lies in developing the existing site without compromising their core organisational goals of education and conservation whilst providing an appropriate level of challenge and risk to their visitors.

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Appendix 2

Table 1 A Policy Matrix For Managers - The 'Top Ten'

Policy Objective

Access Maximisation
Attendance Maximisation
Diversity/Multiculturalism
Economy Maximisation
Education/Conservation
Excellence
Innovation
Revenue Maximisation
Service Quality Maximisation
Social Cohesion

(Gilhespy, 1999 p.41)

Appendix 3. Terms of Reference

The terms 'dials' and 'openers' (Carter (1991) are used in the analysis. The term dial refers to an indicator that can in some way be read like a barometer. An opener operates like an alarm or a warning and arises when an anomalous figure may prompt further investigation. These terms, therefore, describe how the indicator is to be used. Some further terms of reference also need to be established:

- i) Efficiency concerns the best possible relationships between inputs and outputs (Gratton and Taylor 1992);
- ii) Economy refers to how actual input costs compare with planned or expected costs (Jackson and Palmer 1988);
- iii) Effectiveness is defined as how far the output achieves objectives (Jackson and Palmer 1988);
- ii) Equity may be understood as the distribution of opportunities to benefit from cultural activity, engagement and education. Equity has three dimensions, social, spatial and intergenerational.

Appendix 4. Representation of Strategic Model for Cultural Organisations

