Information needs of historic houses

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Abstract

In the United Kingdom (UK) historic houses form part of the tourism and leisure market. Heritage encompasses a wide variety of establishments including historic houses, historic gardens, heritage centres, town centres, countryside and museums. The UK has a vast cultural resource in this respect and the research intends to concentrate on establishments that are known as the "built heritage" and that are often described as "historic" or "country houses". Millions of visitors annually visit properties to experience an insight into earlier periods of British history and culture. Many operate similarly to small businesses and often have a more diverse range of needs.

A model was developed for the study to show the information needs of historic houses and the information seeking behaviour of those managing historic houses.

Data have been collected both via questionnaires and interviews. The questionnaires involved the investigation of those managing (owners, administrators, custodians) heritage establishments. The interview questions were put directly to individuals responsible for properties from a geographically dispersed area, with different categories of ownership (English Heritage, National Trust, private, local authority) and with different levels of visitor traffic. The survey focused on diversity of activities, information provision, use of information, developments (including technology) and collaboration.

Historic houses have been part of a growing sector, allied to the growth in the leisure industry, which has led to increasing demands on their time and finances. In a world that increasingly provides more information than can be handled effectively by any one individual, properties need to be able to make effective use of this to protect the heritage for future generations. Building on the empirical work recommendations are made on policy making, education, audits, co-operation and technology to improve the provision and management of information within the sector to support these establishments.

The research represents the first study to investigate the existing situation of historic houses and their information needs in the UK, to try and provide an overview of the sector and information provision and how that might be improved.

Keywords: Heritage Historic houses Information needs Information seeking behaviour Information provision
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List of Acronyms

ADSL – Assymetric Digital Subscriber Line
ALVA – Association of Leading Visitor Attractions
BLR&DD – British Library Research and Development Department
BTA – British Tourist Authority
CADW – Historic Environment Agency for the Welsh Assembly Government
CC – Countryside Commission
CD – Compact Disc
COSSH – Control Of Substances Hazardous to Health
CPI – Capital Planning Information
CPRE – Council for Preservation for Rural England
DCMS – Department for Culture, Media and Sport
DTI – Department for Trade and Industry
EEC – European Economic Community
EH – English Heritage
ETB – English Tourist Board
ETC – English Tourism Council
HELM – Historic Environment: Local Management
HERO – Heritage Education Outreach Project
HET – Heritage Education Trust
HHA – Historic Houses Association
HLF – Heritage Lottery Fund
ISDN – Integrated Services Digital Network
IT – Information Technology
KM – Knowledge Management
MAGIC – Multi Agency Geographic Information for the Countryside
MGC – Museums and Galleries Commission
MICHAEL – Multilingual Inventory of Cultural Heritage in Europe
MLA – Museums, Libraries and Archives Council
MORI – Market and Opinion Research International, Ltd.
NMR – National Monuments Record
NT – National Trust
ONS – Office for National Statistics
PDF – Portable Document Format
PRO – Public Records Office
PSI – Policy Studies Institute
RDA – Regional Development Agency
RHSBE – Register of Historic Sites and Buildings for England
SME – Small and Medium sized Enterprises
SPAB – Society for the Protection of Ancient Buildings
WT – Woodland Trust
Chapter 1

Introduction

1.1 General Introduction

The heritage sector has become a major economic force. The sector is diverse; it includes historic townscapes and landscapes, archaeological sites and remains, and standing buildings and monuments (Herbert 1995, p.1-20). It is not confined to the United Kingdom. Indeed, heritage tourism and the related activity of cultural tourism are a world-wide phenomenon which was a characteristic development of the last quarter of the twentieth century, partly because of increased leisure time and partly because of the declining real cost of travel (McKercher and du Cros 2002). It has been seen as a tool for forging new kinds of national identity (Ashworth and Larkham 1994), but is not always a blessing to local or indigenous people despite the economic benefits which it can bring (Boniface 1994, p.101-9). In Britain it has become an important industry. There are many historic buildings in both town and countryside throughout the United Kingdom, many of them still in daily use. There were some 452 million visits to historic attractions in 2001, the latest year for which statistics are currently available (Central Statistical Office 2003, p.228-9). The broader context is that about 25% of the adult workforce is engaged in activities such as hotels, catering and hospitality, to which the tourism industry is closely linked (Central Statistical Office 2003, p.80).

In the United Kingdom, the most important buildings – in terms of architectural merit or historic interest – are ‘listed’ by English Heritage, CADW and Historic Scotland. All these bodies have the power to ‘list’ or ‘schedule’ buildings and sites of historic importance. English Heritage, which has oversight of the sector in England on behalf of the Department of Culture Media and Sport, currently has some 370,000 buildings on
its list, although fewer than 10 percent are in Grades I and IIA which are reserved for buildings of exceptional importance (English Heritage 2004). There are some 27,000 listed buildings in Wales (about 2% in Grade I) (CADW 2004), and about 46,000 in Scotland of which about 8% are in Category A as being of greatest importance (Historic Scotland 2004). The Grade I and Category A buildings include some major tourist attractions. Some of these are houses which are still occupied by their owners as well as being open to the public. The Historic Houses Association, which represents this part of the sector, has some 1500 members; the 350 member properties which are regularly open to the public attract some 12 million visitors a year (Historic Houses Association 2004). Many other houses which are not regularly open offer facilities for conferences, weddings and other events, or are open by appointment (Historic House Venues 2004). There is, however, great diversity of ownership and management in the sector. A comparatively small, but disproportionately important, number of properties in England and Wales belong to the National Trust and to its Scottish equivalent in that country. Some are owned by English Heritage, CADW and Historic Scotland, some by local authorities, some by corporate bodies such as universities, some by commercial organisations, others by charities, some by individuals and others by the crown.

These properties need to be managed both as tourist destinations and as historic buildings. This often includes the management not only of the building itself, but also of surrounding landscapes and gardens (which may themselves be of historical importance and included in the listing, or even separately listed) and the contents and interior fabric. For a large house – whatever the ownership may be – this requires the same degree of management as any other business or organisation in terms of financial management, human resource management and the management of the physical assets. There are added complications, especially for properties still in private hands, such as the potential impact of death duties on estates with vast book values which can be realised only by sale of the asset itself (Yale 1992, p.185-90). There is also the overriding factor of the nature of the property; the business derived from it crucially depends on its preservation in a recognisable and ‘authentic’ form. This can be in
conflict with the typical business objective of maximising profit, and has to be seen as one of the constraints on management and long-term planning (Laws 2001, p.82-5).

Effective management is based on appropriate and timely information. Many properties have libraries as part of their assets, but these are typically collections that are part of the history of the property or the family (Purcell 2002, p.157-74; Jervis 2002, p.175-90). Do any houses have a library or information service that provides them with information required to run the establishment? These properties are similar to SMEs. What information is available to them, and through what sources? Agencies such as English Heritage, CADW and Historic Scotland, or the Department of Culture Media and Sport, might be thought of as potential providers of information. But even the National Trust does not have a central information service or library that helps those responsible for individual properties to manage their knowledge throughout their organisation.

We are seeking to determine the information management issues in relation to these properties, and, in particular, how information needs are identified and addressed. This is an untapped area of research; no published data exists on how information is used or required at historic houses\(^1\) in the UK. The sector itself is seeing an increase in the amount of research into work at historic houses, though this is largely from a preservation standpoint. However the importance of the use of information is paramount and to date has been overlooked. To achieve this, the research has developed aims and objectives, combined with an appropriate methodology, to ensure that this is achieved.

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\(^1\) The term historic house is used to denote stately homes, manor houses, castles and similar properties of historical significance, in whatever state of repair, that are accessible by the public
1.2 Aims of the study

The main aim of this study is to ascertain the information needs of historic houses through surveying the information requirements of a discreet sample of properties to discover the diverse functions that are performed at an operational level during the running of the property. Furthermore to this the study investigates actual practice at historic houses and use of information to determine the appropriateness of their information provision. In order to achieve this, the following objectives have been established for the study.

1.3 Objectives of the study

There are five objectives to address the aims noted above:

1. Discover the information needs of the properties
2. Identify the information which is required by historic houses
3. Reveal sources and types of information used in the operation of historic houses
4. Determine gaps in historic houses’ information usage
5. Propose alternative sources, and methods of information management to increase the efficiency and effectiveness of historic houses.

1.4 Hypotheses

The following hypotheses apply to the information needs of historic houses in the UK. They serve as the basis for the investigation.

1. Historic houses are very diverse in their management, but despite this they have common information needs.

2. The wide variety of activities taking place at historic houses means that they have a wide range of information needs.
3. Historic houses appear not to have adequate internal information services to ensure dissemination of information.

4. Current information sources are not adequately fulfilling establishments’ information needs.

5. There is scope for collaboration and co-ordination in assuring and maintaining the flow of information to historic houses.

6. There is scope for the improvement of information management within historic houses.

1.5 Significance of the study

This study is unique in the sense that no study or related study regarding information in the historic houses sector has taken place and can be a major step towards suggesting developments to enhance and improve the provision of information in the heritage sector. It is important to investigate and evaluate information resources, provision and education of personnel in the light of the planned objectives. The study will reveal important results, as it will reflect the views of those managing historic houses, and will also be useful to providers of information resources and services in the heritage sector. It will significantly help to define the problems that exist for information provision in the heritage sector and highlight developments that may improve that provision.

1.6 Structure of the study

There are nine chapters in the thesis which provide a background to the study, the methodology and discussion of the data collected and conclusions and recommendations. In chapter 1 an introduction to the study is given, followed by a discussion on the general background to those aspects relevant to the heritage sector, its
most important features and the main points which relate to the study. It describes what we mean by heritage and those properties that are part of that sector. It also examines the place that heritage has in modern times. In the second chapter the literature on leisure, heritage and tourism and how they interact with and have impacted upon each other is reviewed. It looks at the growth of interest in that same sector and the activities that occur at historic houses. Further to this it reviews the literature on related areas and how information management takes place in those. Tacit knowledge and its importance to historic houses is discussed along with information needs. Chapter 3 introduces the methodology used for the research and the characteristics of the model developed for this study. Additionally it outlines the methods used and the development of the tools employed in the thesis, and the data analysis. In chapter 4 the research discusses the results received by questionnaire analysis, analysis from the interviews and information gathered from the literature review in relation to the similarities between historic houses and small businesses regarding information needs. The following chapter reviews the data from the literature and analysis from the questionnaire and interview results in relation to the diversity of activities at historic houses. Chapter 6 analyses the results received from the collection mechanisms already stated and compares this with the data gathered from the literature review to discuss information provision at historic houses. The subsequent two chapters, seven and eight both analyse and discuss the findings from the questionnaires, interviews and the literature, but in relation to improvements in the use of information and collaboration and coordination in the heritage sector respectively. The final chapter presents the general conclusions, main findings, recommendations and suggestions for future research.

1.7 General Background

Most of the information contained within this section will have been discovered during the literature review. Due to the lack of specific work done on information work allied with historic houses the research has been necessarily wide ranging and has included looking at: tourism; culture; heritage; historic/country houses; information needs; and information management in museums.
Sections on each of these give useful background on the environment in which historic houses operate. Combining these together will start to give some emphasis on why the research is important and the implications for those responsible for running historic houses as a business.

### 1.7.1 Defining the 'Heritage'

The word "heritage" is defined in the Oxford English Dictionary as "what is or may be inherited" (Sykes 1983). Current usage of the term ‘heritage’ is not entirely reflected in this definition. Two Acts of Parliament have also failed to define it. The National Heritage Acts of 1980 and 1983 that created the National Heritage Memorial Fund and the Historic Buildings and Ancient Monuments Commission did not describe what was meant by the ‘heritage’. Lowenthal noted that those who drafted the act stated that it would let the heritage define itself as it was impossible for them to do so (Lowenthal 1985, p.36-7). Lumley, writing in the present, reflected on the work of Lowenthal and others, on defining heritage and although discussing the political connotations of the debate and the increasingly broader context of heritage to include natural phenomena as well as anthropological aspects of culture also concluded that “it was perhaps wise (tautologically) to ‘let the national heritage define itself’” (Lumley 2005, p.16-17).

The 1980 Act, which led to the creation of the National Heritage Memorial Fund, included

"providing financial assistance for the acquisition of land, buildings and objects of outstanding historic and other interest" and materials "of outstanding scenic, historic, aesthetic, architectural or scientific interest" (Hewison 1989, p.15-23).

The subsequent 1983 Act led to the formation of the Historic Buildings and Ancient Monuments Commission. It stated, importantly, that the new body was to
"promote the public's enjoyment of, and advance their knowledge of, ancient monuments and historic buildings" (National Heritage Act 1983).

Despite not providing a clear definition of the heritage it is intended to protect, the effectiveness of the National Heritage Acts has not been diminished. In 1984 the Commission became known as English Heritage and began actively promoting properties in its care to the public (Eastaugh and Weiss 1989, p.59-60). With the creation of English Heritage in 1984 the United Kingdom had three organisations promoting historic properties to the public. These range from ruins to houses that contain a wealth of fine art and antiques. English Heritage, the National Trust and the Historic Houses Association are all responsible for the protection and promotion of historic properties to those members of the public who maintain an interest in the nation's heritage. These organisations have different aims and are responsible for the maintenance of various designations of properties. They support considerable activity for those engaged in the heritage business.

1.7.2 The built heritage

To narrow the focus of the research it is necessary to investigate further definitions for heritage. The Policy Studies Institute (PSI) report on the economics of the arts and built heritage includes the performing arts, combined arts, museums, galleries, media industries and the built heritage in their report on the cultural sector (Casey, Dunlop and Selwood 1996, p.140-58). Culture as defined in the report is too broad to be covered in this research and some of those areas mentioned above have already received the attention of other writers. However, the definition given by the report and termed the ‘built heritage’ is closer to defining the area this research covers. Casey, Dunlop and Selwood describe it as embracing

“the human-made historic environment – historic buildings, ancient monuments and archaeological sites, historic gardens and designed landscapes, battlefields,
industrial buildings and historic wrecks” (Casey, Dunlop and Selwood 1996, p.140).

This more tightly defines the sector of the heritage industry the research covers, including only those heritage attractions that include built elements. The report describes these as historic properties and reviews the funding, earnings and employment figures for these establishments. Sources referred to in the PSI report by Casey, which include the British Tourist Authority and the English Tourist Board, also refer to them as historic properties. It is a term that will be used in this research and is seen as central to the discussion on historic houses. These agencies are using the term in a broader sense than this research; however, an evocative word that invokes images of stately homes, manor houses and castles; these are the very essence of the topic being researched.

Herbert uses the term ‘heritage places’ which “include historic buildings […] which bear the distinctive imprint of human history” (Herbert 1995, p.9). Architecture and other facets of properties’ histories can be included in this meaning. It is also important to note that historic houses can be found in differing states of repair. At some properties a tour can be taken of a house that has contents from the same period as that in which the house was built, while others may be open-air ruins. The PSI definition mentioned previously is preferable to that given by Herbert as it covers both of these aspects as well as others unrelated to this study. The research will concentrate on the built heritage and, more specifically, historic houses and castles.

1.7.3 Historic houses as heritage

These definitions bring the research closer to the sector of the heritage industry being researched. Historic houses are often inhabited by the owners or preserved by a heritage organisation; they may be in good condition with their contents intact or they may be in a permanent state of decay. The overriding criterion is that they should be accessible to the public. This is essential if properties are to be included as a part of the
heritage industry; otherwise they remain as private residences. Historic houses have been central to the history and traditions of the UK. James Lees-Milne wrote that

“the great houses of Britain, with their infinite appeal and varied associations, have epitomized many aspects of the island’s history and they are at long last venerated as the traditional archives of our past and present” (Lees-Milne 1946, p.61).

Lees-Milne himself was Secretary to The National Trust’s Country House Committee from 1936-50 who had influence in the rise of the popularity of historic houses by helping the Trust bring houses into public ownership through the impact of inheritance tax laws and a unique relationship with the state through a series of National Trust Acts (1907-71). This relationship has helped to affirm a national heritage agenda that is based on a premise ostensibly put forward by privileged and influential people. They were also helped by the fact that at least “1,116 country houses were demolished between 1875 and 1975” (Hewison 1987, p.54), which allowed those responsible for historic houses to drive a preservationist agenda to halt this decline and preserve what was left for the nation to enjoy. He went on to state that country houses were of importance because they impart five important aspects of our history, these being:

1. The study of evolutionary vernacular architecture
2. The study of domestic arts through their contents
3. The study of horticulture and silviculture through their grounds
4. The spirit of field sports
5. The study of social history (Lees-Milne 1946, p.61).

Although it can be argued that not all of these have the same prominence today in the same way that they did when Lees-Milne was writing, they are still valid expressions of the attraction of historic houses and why they are a magnet for tourist activity. Part of this tradition and history is the country house. It has been described as “one of the definitive emblems of British cultural tradition” (Hewison 1987, p.71). This view
echoed the Gowers Report from 1950, which embraced the view of the Duke of Wellington that, the “English country house is the greatest contribution made by England to the visual arts” (Treasury 1950, p.3). These statements are indicative of the place that historic houses have in the cultural traditions of the nation and why visitors are attracted to them. Both the sense of history that they exude and the sense of visual pleasure that they offer is part of their global attraction.

Graham, Ashworth and Tunbridge wrote that

“nationalism and national heritage developed synchronously in nineteenth century Europe. That nation-state required national heritage to consolidate national identification …” (Graham, Ashworth and Tunbridge 2000, p.183),

and it is this national focus that has enabled historic houses to become a “public symbol of national pride” (Mandler 1997), and an integral part of the tourist industry in, and for, the UK. In many ways the work of Lees-Milne and the National Trust has achieved its aim of promoting historic houses as a part of the nation’s heritage. Hewison’s reference to the emblematic nature of the country house above confirms this and provides an example of the historic house as a focus of the national heritage and what has become a focus of considerable interest to visitors from abroad.

1.7.4 Historic houses through the centuries

Historic or country houses are seen, as quoted above, as an integral part of the heritage industry. It could even be considered one of the most prominent parts of the sector. Historic houses as attractions are not a new phenomenon, however. “For many centuries the ownership of land was not just the main but the only sure basis of power”. This is how Girouard describes the beginnings of the emergence of country houses from the Middle Ages until the nineteenth century as land was of no use without a country house on it to provide the power base for ambitious families (Girouard 1978, p.2). He emphasises that “anyone who had money by any means, and was ambitious for
himself and his family, automatically invested in a country house” (Girouard 1978, p.2). Houses were built not just for power but also for pleasure and houses were also a source of entertainment for both families with power and those not as powerful.

They have been opening their doors to the public since the Middle Ages. Fortified manor houses were converted in this period to make more comfortable residences for their owners. From the 16th century the new business classes of the time bought up monastery land to build their own great houses (Yale 1991). Goeldner, Ritchie and McIntosh state that these same classes, along with diplomats and scholars, were able to travel abroad on what is now universally known as “The Grand Tour”. This included travelling to France, Italy, Germany and the Low Countries for a three-year tour (Goeldner, Ritchie and McIntosh 2000, p.44-65). Goeldner and others describe this as an educational experience including Girouard who says “it became a stock part of every young man of wealth and birth to travel round the continent, to form a collection” (Girouard 1978, p.177). There is no doubt that this is certainly how owners of historic properties still view that period. Lord Briggs is quoted as saying at the International Heritage Conference in 1977 that it was a “wonderful visual education” (British Tourist Authority 1977, p.15) and that “it was through the grand tour that people brought back ideas about how to organise their own house and how to decorate them and furnish them” (British Tourist Authority 1977, p.15).

Yale states that the ‘Grand Tour’ gave rise to the collection of objet d’art of which many examples can now be found in the historic houses of the United Kingdom and are significant attractions that bring visitors to historic houses. He follows this by describing a house building boom in the 18th Century, and a corresponding rise in visiting historic properties, because of a shift in the cultural climate of the day. Yale illustrates this boom in visits with data which shows that in 1776 Wilton House had 2,324 visitors and that in 1760 Chatsworth was open for viewing for 2 days a week (Yale 1991, p.57). The literature suggests that the Grand Tour had a significant impact on some owners of historic houses in this country and influenced the building architecture, activities in, and collections found in establishments. The tradition had
grown from the 1500s when scholars and English gentlemen were sent to “gather information which could be turned to the nation’s advantage and to train them as representatives of England’s prestige at foreign courts” (Hibbert 1987, p. 15). In the 18th Century this still held true for some travellers but the debate raged over whether it was worth the considerable expense of travel. Adam Smith is quoted as saying that most did not profit from the experience (Hibbert 1987, p.235) but certainly there were those who held a “belief in foreign travel as a means of education and, particularly social finishing” (Black 1992, p.303). Certainly inspiration was gained from the Grand Tour by the landed gentry as can be seen through the example of Lord Burlington who built Chiswick House which was influenced by Palladian architecture and who also bought back William Kent to England after he had studied in Rome to undertake the painted decorations in Burlington House (Wilson 1977; Black 1992). Certainly its “influence upon British life and thought, and tacitly accepted attitudes, was particularly potent” (Mullaly 1982).

From the 19th century properties became accessible to larger groups. This was made possible by the increase in education for the middle and working classes. Ibrahim says that the:

“Victorian era saw an acceleration in the cultural transmission of many of the practices of the upper stratum into the middle stratum and eventually into the lower stratum as well” (Ibrahim 1991, p.132).

He argues that the upper classes encouraged the lower classes in society to see other aspects of the nation’s culture, which aided the spread of literacy. Whether through their own volition or because they were emulating the upper classes, the middle and lower classes acquired other interests. The opening of Hampton Court in 1838 by Queen Victoria and the 80,000 visitors admitted in 1849 to Chatsworth House, as quoted by Yale, attest to the increasing cultural significance of historic houses to society at this time (Yale 1991). According to Goeldner and others, trains began
carrying passengers in 1830 and as the prices undercut the stagecoaches of the time this helped the mobilisation of the masses (Goeldner, Ritchie, and McIntosh 2000).

Goeldner states that the invention of the motor car led to even more access for the public during the 20th century, but the impact was delayed until later in the century when road networks capable of supporting increasing numbers of cars were also introduced. Cornforth states that the rise in visitors to historic properties between 1953 to 1963 directly correlated with the rise in car ownership at the time (Cornforth 1974, p.14-19). Many properties were built as country residences. The increase in mobility created by cars and motorcycles during this period meant that properties became more accessible to the public as it was now possible to drive to those located in the countryside. Yale states that by 1920 most houses were making a charge for both car parking and admission (Yale 1991). It might even be intimated that given the high numbers visiting houses such as Chatsworth in the previous century, it is surprising that charging on a regular basis had not occurred earlier. Historic houses were often central to the community that surrounds them, and in many ways still are, and offering free access was a way of welcoming people and making them feel part of the establishment.

### 1.7.5 Historic gardens and houses

There is evidence in the literature indicating that visitors have also been drawn to view gardens at historic houses. There are properties that open only their gardens to the public but not the house. Examples include Cholmondley Castle Garden in Cheshire and the gardens at Heale House in Wiltshire. Interestingly, gardens of historical interest have a similar pattern of evolution to historic houses. Where the house was seen as the base of the family’s power, the garden was the setting for entertainment and meditation and was seen as “a symbol of pride and an expression of royal and aristocratic magnificence” (Strong 1979, p.11). The 16th century saw the first walled gardens created at Hampton Court where previously there had only been vegetable patches. The transformation continued through the 17th and 18th centuries when greenhouses evolved to become orangeries (Yale 1991). Owners travelling abroad on the “Grand Tour” led
to new plants and ideas being introduced in both gardens and historic houses according to Yale. Goeldner and others describe the “Grand Tour” as taking in France, Italy, Germany and the Low Countries and was undertaken by the upper and business classes. They also state the tour as being responsible for bringing more exotic art, plants and ideas to Great Britain (Goeldner, Ritchie, and McIntosh 2000). The same time period saw the “introduction of the garden as a setting for the display of antique sculpture” (Strong 1979, p.10) Yale states that formal gardens became less popular in the 18th century, which led to landscape gardening by entrepreneurs such as Capability Brown and Humphrey Repton (Yale 1991). Today, many properties have gardens that are of equal or greater historical interest than house due to these influences mentioned above. In some cases the house and/or the garden may be listed as of historical importance, on either English Heritage’s National Monuments Record or Register of Parks and Gardens (English Heritage 2001). Properties such as Hever Castle in Kent and Stourhead in Wiltshire attract visitors to view the gardens in greater numbers than visit the houses and their collections.

1.7.6 The modern view of heritage

Historic houses have seen centuries of change, but they are still a cultural focus for the people of the nation. Today, however, the range of establishments and attractions that use the term heritage in their promotion gives an indication that the word, if not over-used, is being used in its broadest possible sense as defined in the Oxford English Dictionary. The discussion above in 1.7.3 reflects the way that historic houses have become part of the national heritage and still continue to define it despite changes in the way that heritage is now being viewed. A search on the Internet using the Google search engine and the term heritage reveals the existence of the Heritage Lottery Fund, UK Heritage Railways, Heritage Hotels and the Heritage Motor Centre amongst others. In these examples the term heritage is used in its widest sense to convey a particular meaning to attract visitors. They still conform to the essence of the Oxford English Dictionary definition by virtue of being associated with some aspect of the nation's history or culture. What we can see from this reference to Google and the myriad
references to heritage is that there has been an emphasis in the heritage sector towards the Disneyfication of culture. To bring the crowds in many properties or institutions have adopted tactics to try to ensure increasing visitor numbers. Harrison notes that both the Natural History Museum sought help from Disney to make them “more appealing to the public” (Harrison 2005).

Interestingly, the first National Heritage Conference of 1983 defined heritage as:

"that which a past generation has preserved and handed on to the present and which a significant group of population wishes to hand on to the future" (Hewison 1989, p.15-23).

Although not comprehensive this does provide a narrower definition. It could also be argued that those organisations promoting historic properties, including the National Trust, would see this as their role. Members join heritage organisations to ensure that historic properties are protected for the next generation to enjoy. To some extent what we now see in the heritage sector is that everything is heritage to someone and this is reflected by Harvey who notes that the sector is “eschewing mere entertainment and leisure and promoting its role in agendas of education and social cohesion” (Harvey 2008). The sector is looking forward and, although still driving its own agenda, is open to the possibilities that heritage of the same object or place can mean different things to different people.

Perhaps the most promising definition so far for heritage comes from the Department for Culture, Media and Sport (DCMS) in The Historic Environment: A Force for Our Future. It states that:

"it is more than just a matter of material remains. It is central to how we see ourselves and to our identity as individuals, communities and as a nation. It is a physical record of what our country is, how it came to be, its successes and failures. It is a collective memory, containing an infinity of stories, some
ancient, some recent: stories written in stone, brick, wood, glass, steel: stories inscribed in the field patterns, hedgerows, designed landscapes and other features of the countryside” (Department for Culture, Media and Sport 2001, p. 7).

More a statement than a definition it conveys the all encompassing aspects of heritage in a modern setting. It is also indicative of the environment that historic houses belong.
Chapter 2

Literature Review

Chapter 1 provided background on the definitions of heritage enabling the review in this chapter to examine aspects of the heritage sector, as well as related areas. To be able to support the empirical evidence the literature review has focused on the following core areas of Heritage, tourism and leisure; Historic houses and their activities; and heritage organisations.

Additionally it focuses on organisations that share similar characteristics. Museums operate in the heritage environment and small and medium sized enterprises (SMEs) are operationally of a similar size. Literature on museums and SMEs provides further insights for the research regarding information needs and information management.

Historic houses operate within an environment that has an immense impact on the way their business is conducted. The environment dictates, in part, some of the activities that are provided for their "customers". The literature, as will be illustrated, often quotes historic houses in the context of heritage tourism. With this in mind the review places heritage within the context of tourism and looks at the effect this has on the formation of historic houses in a modern context.

It can be argued that activities and functions taking place at historic houses have emerged as a result of the relationship between heritage and tourism. These activities form the nucleus of historic houses. Determining the breadth of these activities from the literature enables inferences to be made on supporting them through the improved use of information. Historic houses can be members of larger heritage organisations and the review examines these to determine their role in the support available for historic houses.
Little relevant literature exists on the information needs of historic houses. To address this, comparable literature on the information needs of museums and SMEs is examined. This focuses and analyses the correlation between the activities and information use of museums and SMEs and those of historic houses.

2.1 The interaction between leisure, tourism and heritage

How has this modern view of heritage evolved? The discussion that follows examines the relationships between leisure, tourism and heritage. In turn this helps determine how the modern view of heritage is inter-related with consumerism and tourism.

The term leisure is described by the Oxford English Dictionary as “free time” (Sykes 1983). In a similar manner to the definition of heritage it does not encompass the modern concept of leisure. Others have attempted to provide a more comprehensive description for leisure. Goodale and Godbey describe it as a “set of activities which one engaged in during leisure time” (Goodale and Godbey 1988, p.209).

This is an improvement on the Oxford English Dictionary definition because it provides an indication that people undertake some form of activity in their leisure time. Herbert, in his definition, describes leisure time as that in which choice is the dominant factor; where there is no time commitment to work; and where individuals perceive it as leisure (Herbert 1995, p.2-12). Herbert has added to the definition of leisure the concepts of choice, freedom from work and individual perception. This portrays leisure as a personal and meaningful activity for the individual. This is exemplified by one person enjoying gardening, while another may read a book, yet each perceives them as leisure activities. Torkildsen amalgamates these and other definitions and concludes that there are five overlapping aspects to leisure. These are:

1. leisure as time
2. leisure as activity
3. leisure as a state of being
4. leisure as an all-pervading, holistic concept
5. leisure as a way of life (Torkildsen 1999, p.73-8).

Leisure time and activity are also perceived by Herbert as noted earlier, but the other three aspects stated by Torkildsen are distinctly vague. This is understandable as he is attempting to provide an inclusive definition for leisure and he does achieve some level of success. If individuals perceive themselves as being at leisure then it can be argued that they meet the conditions of Torkildsen’s third aspect of his definition. The fourth and fifth aspects are indicative of the modern world. Health clubs, art galleries, cinemas, historic houses, and libraries are examples of leisure activities that can be undertaken by the public at their own convenience in the 21st century.

Leisure should not be confused with tourism, however. Tourism has a different definition from that of leisure. Leisure can occur in different forms. Reading a book or visiting a castle can be leisure, but tourism can be expressed as excursions or holidays to destinations away from the home. This is reiterated by Herbert’s view where “people become tourists when they leave their homes for a significant period of time to visit places” (Herbert 1995 p.5).

In their textbook on tourism Goeldner, Ritchie and McIntosh treat the terms travel and tourism synonymously (Goeldner, Ritchie and McIntosh 2000, p.44-65). This strengthens the point made by Herbert. This indicates that when leisure involves travel, whether domestic or international it forms a part of tourism.

2.1.1 The growth of leisure

The heritage industry saw considerable growth in visitor numbers at historic properties in the latter part of the 20th century, as the following examination of the literature reveals. Growth in leisure time and pursuits and also in tourism in the 20th century has some parallels with the growth observed in the heritage sector. This growth, as will be demonstrated, is to some extent connected.
The growth in leisure during the latter part of the 20th century has given rise to a society in which leisure is prominent. Gershuny and Jones showed that there was a decrease in time spent at work and an increase in leisure time from 1961 to 1983/84 for certain groups. They arrived at this conclusion by studying the use of time for both men and women in work and the home. The resulting data showed that men had 10% more leisure time in 1983/84 than in 1961, while employed women had 19%. Unemployed women showed an increase of 17% indicating that the rise in unemployment from 1961 to 1983/84 did not affect the amount of leisure time available to individuals (Gershuny and Jones 1987, p.9-50). Roberts reported in 1978 that an explosion in leisure activities took place in Great Britain during the 1970s. He explained this by describing increases in recreational sale goods, and attendance at art galleries and museums. It was stated that sales of golf balls rose from 13 to 20 million and that fishing rods, reels and tackle grew by 66%. Further evidence was provided through quoting attendances at the four main art galleries in London which rose from 2.6 million in 1965 to 3.2 million in 1973, while the ten major national museums in Great Britain had seen a rise in visitor numbers from 7 to 12 million. In his own words: “It is difficult to see how this boom in recreation can be explained apart from a growth of leisure” (Roberts 1978 p.21).

In a later publication he reports growth in the leisure industry from 1971-1996. He illustrated this through the use of consumer spending figures. He showed that, in the period 1971-1996, overall consumer spending had grown by 94%. It can be argued that consumer spending is still high as the UK enjoys low interest rates due to the effects of strong consumer spending. Roberts also noted that some areas had grown at a higher rate. It is interesting to note that tourism, for example, had grown by 213% indicating not only growth in leisure, but also tourism (Roberts 1999). Gratton and Taylor reviewed labour force statistics for the 1970s and early 1980s and concluded that fewer hours were being worked than in the 1950s. They also stated that leisure time was expanding, which they argued was indicated by increases in holiday entitlement from the 1950s to the early 1980s (Gratton and Taylor 1987). The conclusions Gratton and Taylor have made are sound, but there are factors which are omitted from official
statistics that can affect the figures. These include unofficial and unpaid overtime and also informal or “black economy” work. Indications do point to a growth in leisure time in the second half of the 20th century. Additionally the increase in leisure time so far described has led to an increase in recreational visits. This is supported by a Countryside Commission survey that found that 50% of the population made a visit to the countryside every fortnight during the period of a year and of these visits, 30 million were made to historic houses (Countryside Commission 1984). It can be concluded from these sources that the increase in leisure time recorded by Gershuny and Jones has led to the public being able to undertake more recreational visits. It is also reasonable to assume that, of this increase, a proportion would be attributable to visiting historic houses.

2.1.2 The rise in tourism

Martin and Mason discovered that between 1979 and 1989 the number of adults taking short trips in Britain had increased by 31% and the number of foreign visitors increased by 38% (Martin and Mason 1992). This exemplifies the growth of tourism that took place in the latter part of the 20th century.

Changes in modes of transportation and its accessibility to the general public have helped to increase tourism (See above: 1.7.4.) According to Goeldner and others spa towns and seaside resorts benefited from the introduction of the railway networks and by 1861 there was a demonstrable need for vacation travel. They also state that resorts soon introduced other forms of entertainment that induced other visitors to spend their leisure time there (Goeldner, Ritchie and McIntosh 2000). Thomas Cook introduced the package tour at this time and with it enabled vacation travel for the masses and the ability for a wider section of the population to participate in tourism (Buzzard 1993). These developments have been paramount to the creation of the tourism industry in the UK and have enabled it to flourish.
Goeldner and others stated that with the introduction of the jet aeroplane in the 1970s, flights from the US to the UK heralded the beginning of a new age of international tourism (Goeldner, Ritchie and McIntosh 2000). It has enabled travel to other countries for UK residents, but more importantly for our purposes, it has increased the number of overseas visitors to the UK. The figures quoted from Martin and Mason above indicates that there is an element of truth in this. The number of overseas visitors coming to the UK, most notably from the USA, did increase from 1979 to 1984 according to Gratton and Taylor (Gratton and Taylor 1987). Richards quotes the 1990 Overseas Visitor Survey by the British Tourist Authority as showing that 67% of overseas visitors cited visiting a heritage attraction as important when deciding to visit the UK. The number visiting historic buildings remained consistent at approximately one third of the total number of visitors. In 1985 it was 33% of the total and in 1992 it was 31% (Richards 1996). This indicates the importance of heritage attractions to the UK’s tourism industry and also the importance of heritage tourism to the UK Government. This is emphasised by the DCMS report on *The Historic Environment* that describes the nation’s heritage as a “magnet for tourists” (Department for Culture Media and Sport 2001, p.7), which is “massive in economic terms” (Department for Culture Media and Sport 2001, p.7).

Figures from the *Annual Abstract of Statistics* show that in 1988 spending in the UK by overseas visitors was £6,184,000,000 at current prices. The figures for 1998 are £12,671,000,000 at current prices (Office for National Statistics 2000, p.191). Spending has more than doubled over the ten-year period and is a considerable boost to the UK economy. These figures reflect the whole of the tourism industry in the UK.

The effect upon these figures by historic buildings is notable. The *Heritage Monitor 2000* quotes an English Tourism Council survey in 1999, stating that 32% of visitors to historic buildings were from abroad. It further adds that a British Tourist Authority survey in 1995 discovered that 73% of overseas visitors had visited a historic building (ETC Research and Intelligence 2000, p.59). Despite the fact that large numbers of overseas visitors visit those historic buildings in the capital, rather than other parts of
the UK, it is indicative of the importance of historic properties to the UK’s tourist industry.

2.1.3 The growth of heritage tourism

The relationship of heritage, leisure and tourism is inter-related, but not interdependent, according to Herbert (Herbert 1995) reinforcing the point that historic houses also act as foci for formal education and conservation without being related to leisure or tourism. Tourism does include visiting beaches while on holiday, but can equally exclude visits to historical buildings, while the work of conservation continues, often regardless of the number of visitors an establishment might receive. Heritage, tourism and leisure are independent of each other, but where their activities converge it can be termed heritage tourism according to Herbert and additionally he stated that this was a minority activity in peoples’ leisure time (Herbert 1995, p.2). However, current evidence suggests that heritage tourism is growing. The Heritage Monitor 2000 states that since 1982 visits to historic properties have risen by 30% (ETC Research and Intelligence 2000, p.42-65). This is based on a constant sample year on year and is therefore unaffected by the addition of new properties in the industry. From this it is apparent that there is an increase in the visiting of historic buildings by the public during their leisure time and consequently we can see that there has been an increase in heritage tourism.

Additionally the growth of heritage organizations also provides evidence of the public’s growing interest in historic houses. John Cornforth states that in 1953 the National Trust had 600,000 visitors to its 91 properties and by 1963 they received 1,400,000 visitors to their 127 properties (Cornforth 1974, p.14-19). This is a considerable increase in visitors over just 10 years. The number of visitors had more than doubled while the number of houses that were made accessible to the public increased by more than a third indicating a growth in the public’s interest in historic houses.
Membership figures for the National Trust show a significant rise over the last twenty years, as can be seen in figure 5.1. The Trust’s membership rose from 1.1 million in 1982 to 2.8 million in 2002, (National Trust 2002), showing an increasing trend over the last 20 years. National Trust members have elected to pursue their interest in the nation’s heritage by paying an annual fee for the privilege. This indicates that they have an interest in helping to preserve this heritage and to visit. Growth is likely to decelerate in the future, because the proportion of the UK population both attracted to, and able to afford membership of, Heritage Organisations, such as the National Trust and English Heritage, is finite. Despite this the membership of the Trust is large and accounts for many visits to historic properties. A member may, after all, visit many properties on numerous occasions.

2.1.4 Museums as a part of the growing heritage trend

Robert Hewison, in The Heritage Industry, expressed concern about the growth in the heritage industry. Hewison noted that in Britain a new museum opens every week. He then posed the question as to how long it would be before the country was one vast museum (Hewison 1987). His comments are not misplaced. Museums form a significant part of the heritage sector and trends observed in that domain can serve as an indicator for the rest of the industry. Hewison had at his disposal the most recent survey to date, published by the Museums Association in 1987 (Museums Association 1987). It reported that there were 2,131 museums and that of these half had opened since 1971. These figures indicate why Hewison argued that the UK was becoming a museum. Data available from the Museums and Galleries Commission in 2000 show that there were over 2,500 museums in existence in the UK; a quarter of all museums had opened its doors to the public since 1981 (Museums and Galleries Commission 2000). It is clear from this that there has been a substantial increase in the number of museums in the UK. However, the figures quoted in each survey could be affected through the use of different definitions by each body to determine if an establishment can be included in their association as a museum. Any count of museums or measure of their growth can be affected by this difference and it is possible that growth may no longer be as
pronounced as in the 1980s. *A manifesto for museums* quotes 2,500 museums still in existence which indicates that at least the position is possibly static (NMDC, MLA and GLLAM 2004). However the *Renaissance in the Regions* report indicates that there were 1,860 museums who had met basic standards of care of collections, management and provision to the public (Resource 2001). Although growth would seem to have stalled what should be noted is that quality standards are in place and that museums are as popular as ever.

Figures from Resource for 1999 show a decline in visits to museums and other heritage attractions (MORI 2001, p.4). This may indicate a reversal of the rising trend previously shown, but recent figures in the *Museums Journal* for museums across the UK indicate a rising trend over the last 3 years, the National Museums Liverpool venues, for example, saw a 28% increase in visitors between April 2007 and March 2008 and a 164% increase since 2001/2 (Harris 2008). One or two, such as the Victoria and Albert saw a dip in visitor numbers in the last year, but over the 3 year period numbers have risen. Although there is always a question of financially viability in the sector these figures show the public’s attraction to heritage. It is very important to note that funding provided by local authorities or other bodies will often be targeted before other services made available to the public. Hewison does, however, make a valid point regarding the rise in the growth of the heritage industry. If the use of the term heritage is used to describe an increasingly diverse number of activities and places in the United Kingdom, it will become an alarmingly large market that will be competing fiercely for visitors.

2.1.5 Breadth of the Heritage Industry

The heritage industry has a breadth and depth that is both difficult to quantify and qualify. Prentice noticed this breadth and how closely heritage had become entangled with tourism. As a result he created a typology of 23 subject-types (Prentice 1993, p.21-50). The typology is reproduced in table 2.0. It ranges from seaside resorts to
natural history attractions. This list is indicative of the size and coverage of the heritage industry.

The typology is comprehensive and can be applied to any country, as Prentice intended. It contains all the elements that make up the historic houses under review, but not under any single heading. The establishments considered by the review can be placed in a minimum of four headings. Stately homes, military attractions, pleasure gardens and those properties concerned with primary production all reflect historic houses as described in this study. Some establishments are also connected to activities in the surrounding countryside. This is because the house owner is a local employer and a focal point within the community. The breadth that is described in Prentice’s typology again reflects the concerns of Hewison regarding the heritage industry. The coverage of types of heritage that establishments can be categorised by is substantial. It is indicative of a large industry, and an increasing one. Prentice’s typology is broad and shows the many facets of the heritage industry; however there are parts that could be deemed to be missing or it is unclear where they may belong, an example of which could be industrial heritage.
<table>
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<th>Examples</th>
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<td>Science based attractions</td>
<td>Science museums, technology centres</td>
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<tr>
<td>Attractions concerned with primary production</td>
<td>Farms, museums, vineyards</td>
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<td>Craft centres and workshops</td>
<td>Water and windmills, potters,</td>
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<td>Attractions concerned with manufacturing</td>
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<td>Transport attractions</td>
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<td>Socio-cultural attractions</td>
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<td>Attractions associated with historic persons</td>
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<td>Performing arts attractions</td>
<td>Theatres, circuses</td>
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<td>Galleries</td>
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<tr>
<td>Towns and townscape</td>
<td>Groups of buildings in urban setting</td>
</tr>
<tr>
<td>Villages and hamlets</td>
<td>Rural settlements</td>
</tr>
<tr>
<td>Countryside and treasured landscapes</td>
<td>National parks, countryside amenities</td>
</tr>
<tr>
<td>Seaside resorts and seascapes</td>
<td>Seaside towns of past eras</td>
</tr>
<tr>
<td>Regions</td>
<td>Counties, other geographical areas</td>
</tr>
<tr>
<td></td>
<td>e.g. ‘Bronte country’</td>
</tr>
</tbody>
</table>

*Table 2.0 Typology for heritage attractions (Prentice 1993)*
2.2 Heritage tourism and historic houses

Heritage tourism, as described by commentators such as Yale and Ashworth, has grown in the 20th century and most significantly in the latter half of that century (Yale 1991), (Ashworth 1994). It can be argued that the increase in leisure time and tourism already discussed has encouraged this growth. This is a considerable increase in visitors over 10 years. Visitor numbers to NT properties had more than doubled and the number of houses that were accessible to the public increased by more than a third. These figures certainly indicate a growth in the public’s interest in historic houses (See above: 2.1.3.)

However, owners of historic houses have had a part to play in the rise of heritage tourism. Historic houses and their owners have been involved in welcoming visitors at their properties, as was noted in section 2.1.3. Private ownership of historic buildings and monuments stands at 44% (ETC Research and Intelligence 2000, p.44). Almost half the historic properties visited by the public are owned by private individuals or families, making them a prominent part of the heritage industry. 1500 historic house owners belong to the Historic Houses Association (HHA) and over 300 of these owners open their properties for the public to visit. This makes a considerable number of properties accessible to the public. Owners of historic houses have shown considerable entrepreneurial skills in attracting visitors, showing a flair for tourism in their attempts to draw the public to their properties. The Marquess of Bath, for example, has opened a safari park at Longleat in Wiltshire and Lord Montagu has opened the National Motor Museum at Beaulieu (Hudson 2002).

The literature is unclear as to whether the opening of houses has been as a result of the difficulties imposed on owners by taxation. Yale states that death duties introduced in 1894 led to problems for stately home owners in the 20th century. The cost of death duties was high even if it occurred just once in one generation. The effect of two world wars in succession was that some subsequent house owners died relatively young leaving large death duty bills. Some of these were as large as 40% of the value of the estate if the property was valued at over 2 million in 1919 (Yale 1991).
The problems that owners of historic properties were facing led to the government creating a committee in 1949-50 under the chairmanship of Sir Ernest Gowers. The Gowers report examined the arrangements that could be made by the government to preserve, maintain and use houses of outstanding historic or architectural interest, that otherwise would be lost to the nation. Loss could occur through neglect or because an owner could no longer afford to run the house. The report made a number of assertions and recommendations. It stated that the public was beginning to share the view of the Duke of Wellington regarding the contribution of the country house to the arts and were drawn to visit properties as noted in section 2.1.2. There was little evidence produced in the report to give substance to this beyond comments about the thousands visiting Warwick Castle and other historic houses. It emphasised that the owners, rather than the state, were the best guardians of this heritage. Although not giving great detail, it did indicate that its witnesses felt that owners had a sense of ownership that extended beyond the house to their own family heritage. Special tax concessions were a major recommendation of the Committee, which argued that this would enable more houses to stay in the owner’s possession, but allow access for the general public. Lastly, the report called for the creation of “historic buildings councils” that would oversee all historic buildings in England, Wales and Scotland. It was envisaged that it would oversee all current Government activities and also support private owners and the National Trust (Treasury 1950, p.48-50).

Mandler states that the report achieved little politically, but it did help to portray the country house as a part of the national heritage that helps to define the nation’s culture (Mandler 1996). It was some time before successive Governments would seek to protect the nation's heritage in the Heritage Acts of 1980 and 1983; the 1983 Act leading to the creation of the Historic Buildings and Ancient Monuments Commission. The Government was presented in 1950 with a report that focused on the problems faced by owners, rather than how the public could gain from any intervention. With hindsight it may be thought that the results are not unexpected. Mandler notes that the newspapers of the day did not support the views of the report (Mandler 1996, p.106).
The idea of tax relief was not supported until the mid-1970s when the Government allowed privately owned historic houses to be exempt from capital transfer tax. Until this moment the Government was careful to avoid being perceived as ‘handing out’ money to the landed gentry and aristocracy.

Where the costs of running a historic property became too burdensome for the owners, the National Trust did take over their running, consequently making them available to the public, as in the case of Blickling Hall and Knole (Benson 1968). This may have encouraged other owners to be more entrepreneurial to help retain the house in the family’s possession. Michael Watson, the owner of Rockingham Castle, speaking at the International Heritage Conference at Woburn Abbey in 1977 said that if the:

“Duke of Bedford had not made that very bold decision some years ago to open up Woburn and develop it in the way that he has, Woburn would not be surviving today” (British Tourist Authority 1977, p.19).

This indicates that owners’ entrepreneurship has enabled families to retain their homes. Whether through necessity, financial burdens, or through a desire to share the nation’s cultural heritage they have been instrumental in marketing their establishments as tourist destinations and have also helped encourage the use of the word heritage. Additionally the HHA has developed as a way of promoting and maintaining privately owned historic houses (Historic Houses Association 2001a, p.4-7).

The year 1977 was designated Heritage Education Year by the HHA (British Tourist Authority 1977). As part of this year an International Heritage Conference was held at Woburn. This is an example of the drive to promote heritage tourism, share best practice and the properties associated with it (British Tourist Authority 1977). The conference was organised by the British Tourist Authority and focused on four broad areas. These were:
1. marketing
2. education
3. international relations
4. the role of the state in conservation.

Speakers from the Government, the HHA, the National Trust and also historic house associations from abroad addressed these topics through their own experiences. The conference then made several resolutions, which are summarised below:

1. International ties for historic houses, on official, organisational and individual levels should be strengthened, co-ordinated and rationalised.

2. There should be an international comparative study of the desirability, extent and effectiveness of State participation in Conservation.

3. Wherever possible, it is not only desirable but also more economic to the State for historic buildings to remain under private control; accordingly efforts should be made to harmonise the taxation systems in Europe and the USA so that they contribute positively towards the conservation of the nation’s cultural heritage.

4. There should be an urgent examination into new ideas and approaches to marketing of the heritage, recognising the continuing changing interests in tourism, which is itself, the natural partner for conservation and the heritage.

5. In accordance with its belief that historic buildings provide a unique resource for education for both children and adults, education authorities and owners of historic buildings be urged to develop educational facilities compatible with particular properties.

6. Art treasures from national collections should be made more widely available to the public or provincial museums and historic properties; the international
bodies concerned should encourage this and help resolve the problems of insurance and security.

7. The appropriate bodies should consider:
   a) a longer and better co-ordinated period for the opening of historic properties;
   b) an international system of distinctive signposting;
   c) the encouragement of commercial operators in co-operation with State tourist offices to develop more heritage tours, especially to smaller properties;
   d) greater contact with local authorities to encourage that interest in conservation.

8. The President of the European Union of Historic Houses should be charged to present this resolution to the President of the EEC and the Commissioner in charge of European Heritage. It should also be presented by those concerned to other appropriate international bodies.

9. In spite of considerable progress in public understanding and interest and sympathetic action by many Governments, the dangers to the heritage remained very great, particularly because the burden of the cost of conservation rests more heavily than ever before on both State and individual (British Tourist Authority 1977, p.5-6).

It is worth noting that greater co-operation and collaboration was being discussed at both a national and international level in 1977. Previous to this the Gowers report had recommended that a central statutory body be created to “act as the central repository of technical advice and guidance” (Treasury 1950, p.19).

The heritage industry had grown considerably since the 1950s, as indicated earlier in the review. Only recently, however, have heritage organisations begun talking about
national collaboration. A meeting chaired by the Director-General of the National Trust heralded the beginning of a new phase of co-operation 25 years later (Historic Houses Association 2002a). This could lead to more collaboration and the sharing of information. With the ability to make access to information easier through the Internet and other methods it is important engage in collaborative activities to share information resources.

2.3 Preservation, conservation and heritage

Heritage tourism has arisen from the need to finance aspects of historic houses. Owners and managers of the properties have always been proud of the heritage they are protecting. Lord Duncan-Sandys was quoted at the *International Heritage Conference* in 1977 as saying “most of the owners of these great houses regard the maintenance of their ancestral homes as their sacred duty” (British Tourist Authority 1977, p.14).

This statement indicates that they have a personal interest in preserving the history for which they are responsible. Preservation and conservation are a part of the heritage industry and need to be considered as an integral part of properties’ activities.

Ashworth has produced a model that characterises the rise from preservation through conservation to heritage over the last 150 years (See figure 2.1.) He describes the evolution of the concern for the preservation of items from the past to the current usage of the term heritage (Ashworth 1994, p.13-19).
Ashworth describes the period from 1850 onwards as a time when preservation was of the utmost importance and the focus was on preserving monuments and buildings. This is supported by the fact that a number of important organisations were founded during this period. This included the creation of the National Trust in 1895 and the Society for the Protection of Ancient Buildings in 1877 (Working Party on Alternative Uses for Historic Buildings 1980). Ashworth argues that those responsible for preserving buildings would have seen themselves as the guardians of the nation’s cultural assets. However the approach was inconsistent; buildings preserved at the time often reflected the tastes of those undertaking the preservation, while other buildings were ignored (Ashworth 1994). This is a perennial problem as any form of selection will always depend on tastes prevalent at the time, but at least there is an understanding that properties other than stately homes are also worthy of saving. The National Trust for example preserves former workhouses and properties of notable persons, such as Beatrix Potter, as well as country houses and estates.
The established definition of conservation is “preserving purposefully” (Burke 1976). According to Ashworth, the 1960s saw a rise in conservation. He argues that this resulted in a shift from preservation, where form was the only criterion for preserving historic buildings. Those engaged in protecting heritage were now also concerned with the function of the property. This led to planners and managers being included in the rehabilitation and regeneration of buildings, and their surroundings as well (Ashworth 1994). This coincides with statements in the Benson Report. A National Trust committee chaired by Sir Henry Benson in 1968 investigated the Trust’s activities and made recommendations for its future. The Trust’s areas of interest were listed at the time as nature reserves, gardens, the coastline, industrial monuments and others (Benson 1968). The report made 59 recommendations regarding the future of the National Trust. Those germane to this study are noted below:

1. Purposes and development of the organisation
2. Constitution
3. Organisation of head office
4. Organisation in the regions
5. Properties
6. Finances
7. Public relations (Benson 1968).

The Report’s overall findings suggested the need to create a more formal structure appropriate for an organisation becoming increasingly large. As a part of this restructuring, the report suggested concentrating on its current activities of preserving houses, castles and coastlines. It stated that the Trust should leave campaigning or propagandising to those organisations that have been created for this purpose, for example the Council for the Preservation for Rural England and the Society for the Protection of Ancient Buildings. This would certainly remove the Trust from undertaking activities that could be perceived as ‘militant’ in nature. The goodwill of Government departments was and is essential to the Trust’s work and refraining from this type of activity could make Government more ready to heed its views.
The final shift in Ashworth’s model from conservation to heritage is seen in the literature from the 1970s. This saw a watershed in the use of the term heritage to represent cultural aspects of society with the holding of the International Heritage Conference in 1977 (British Tourist Authority 1977). This event was used by property owners to promote the interests of their historic properties as part of ‘the heritage’. Ashworth claimed that the shift from conservation to heritage is due to market forces acting upon the “historical product” being offered (Ashworth 1994). His position was that historical people, places and events were the raw materials from which one or more interpretations were made that would be meaningful to diverse groups of visitors. He argued that this process involved ‘process and packaging’ thus making heritage a commodity. This is difficult to challenge. The resolutions from the International Heritage Conference in 1977 reproduced earlier in this review reflect this shift (See: 2.2.) The conference’s fourth resolution focused solely on the marketing of properties, which emphasised historic properties as commodities (British Tourist Authority 1977). Ashworth’s view was pre-empted by Whitt who stated that “heritage is a contemporary commodity” (Whitt 1987, p.15-35).

Many establishments hold historical re-enactments and focus on the history of the house and its owners to market their heritage product to visitors. Hever Castle in Kent, for example, holds jousting tournaments during July, and Petworth House in Sussex makes much of its relationship with the artist Turner (Hudson 2002). Hudson’s Historic Houses & Gardens & Castles and Heritage Sites provides many examples of activities. It is clear from these examples alone that the historical background of establishments is used to ‘sell’ activities at the property, whether it is a craft fair or a guided tour. A further look at activities taking place within the grounds of historic houses occurs later in the chapter (See: 2.4.2-3.)

Mitchell and Mitchell in their paper on ‘consumer experience tourism’ looked at the growing use of tours in factories in the commercial sector and the public’s bonding with brands. It does not directly discuss historic properties, but they do discuss heritage
tourism and state their belief that “consumer Experience Tourism represents a unifying theme for this segment of the tourism industry” (Mitchell and Mitchell 2001, p.23).

Their work was focused on commercial attractions and the heritage concerned with this sector in the US. The arguments already expressed that describe heritage as a commodity correlate with Mitchell and Mitchell’s views. They said, “this tourism phenomenon is the consumer’s relationship to the brand or organisation, not simply the consumer’s relationship to the tourism experience” (Mitchell and Mitchell 2001, p.23).

The reference to ‘brands’ is sensible when viewed commercially. A tourist can, for example, tour the Coca-Cola factory or museum, which would fall into this category of tourism. It can equally apply to historic properties in the UK. The National Trust is a brand that is very powerful and successful in the UK. It has succeeded in attracting 2.8 million people as members (National Trust 2002). It also has shops that sell National Trust branded goods to their visitors. Although it cannot be argued that historic houses are entirely commercial in nature, they are adopting techniques such as branding that enable customers to identify with them.

Despite heritage being treated as a commodity it is clear from the Benson report that the crucial problem that heritage tourism faces is balancing the conflicting demands of conservation of properties with tourism. The report quotes the chairman of the Trust as saying at the National Trust AGM in 1967:

> “the Trust should be ready to meet the needs of the day as they arise, in a manner appropriate to the day, while not at any time losing sight of its primary duty to preserve” (Benson 1968, p.16).

It clearly puts the focus on the conservation of properties, not on tourism. This is increasingly difficult with the high numbers of visitors all historic properties are receiving as evidenced by the figures in the previous sections. Despite the change in
emphasis from preservation to heritage it is important not to lose sight that heritage as a product cannot exist if tourism is allowed to expand to the detriment of conservation.

One area that requires some clarity is that of preservation and conservation within the heritage sector. It is not clear from the discussion above whether there is clarity between the two terms. In the library and information sector the meaning of both is clear. Swartzburg states that “preservation is an umbrella term that applies to the overall responsibilities of caring for collections” and “is achieved through appropriate selection, housing, care and handling, security, climate control, repair and conservation treatment” (Swartzburg 2003a, p.518-20). Swartzburg also notes that “the purpose of conservation is to stabilize materials, to retard their further deterioration and to maintain them in a condition as close as possible to their original form” (Swartzburg 2003b, p. 102-4). The use of the terms indicates the clarity that exists in the sector; conservation is intended to protect items in their existing state using appropriate methods and can be preventative, while preservation is not just about protecting what exists but about ensuring it is available for the future, even if the information contained within is stored in a different format, such as digital.

Houses are not easy candidates for preserving, unlike a book or manuscript they cannot be housed in a climate controlled environment for their protection, although some of their artefacts could be. This same difficulty applies in museums as it is very difficult to preserve everything perfectly, especially working objects. Mann discusses working objects and how best to preserve them, whether to have one to use and one to “lay down” as an archival copy so that the original is not lost (Mann 1994, p.37). The practicalities of doing this in historic houses make it impossible. What is therefore important is to record everything so that even if something is lost or deteriorates then there is still evidence of how it was as noted by Bradley:

“Once an object is in a collection every effort should be made to ensure its survival. If the preservation of an object proves to be beyond the present state of
conservation theory and practice then a complete record including illustrations or photographs must be made” (Bradley 1994, p.51).

The quotes above confirm the definitions seen from the library and information sector that conservation remains the act of protecting the heritage or at least preventing its deterioration to enable its preservation for future generations even if it is somewhat harder to protect an entire house and everything related to it.

2.4 Work at historic houses

There are a wide variety of activities that take place at any single property. These all need to be balanced with maintaining the historic property for future generations.

Garrod and Fyall, in their article Managing heritage tourism, produced a typology of elements belonging to the mission of heritage attractions. The eight elements are listed in the table below (Garrod and Fyall 2000, p.692).

This typology was arrived at through the synthesis of opinions of a panel of experts from the heritage industry that included historic property managers, heritage organisation officers and museum officers amongst others. The panel was composed of personnel that are intricately involved with the day-to-day activities of heritage attractions. The strength of this study was in the use of the Delphi technique. The panellists defined the boundaries of the study for themselves in an initial scoping round and the results can be seen in the typology shown in table 2.2. In further rounds the panellists commented on the elements in the mission of heritage attractions in the light of comments made by other participants. This led to the creation of further lists that prioritised the elements in the typology. The involvement of those in the heritage sector and their decisions regarding the study ensure that the results are truly representative.
<table>
<thead>
<tr>
<th>Elements</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservation</td>
<td>Safeguarding the heritage asset for posterity</td>
</tr>
<tr>
<td>Accessibility</td>
<td>Balancing access to experience against damage to asset</td>
</tr>
<tr>
<td>Education</td>
<td>Interpretation to facilitate appreciation of the heritage</td>
</tr>
<tr>
<td>Relevance</td>
<td>Making asset to as wide an audience as possible</td>
</tr>
<tr>
<td>Recreation</td>
<td>Entertaining and providing recreational activities</td>
</tr>
<tr>
<td>Financial</td>
<td>Sound financial management</td>
</tr>
<tr>
<td>Local community</td>
<td>Working in harmony with local needs</td>
</tr>
<tr>
<td>Quality</td>
<td>High standards used when providing services and facilities</td>
</tr>
</tbody>
</table>

*Table 2.2 Typology for elements in the Mission of Heritage Attractions (Garrod and Fyall 2000, p.692)*

2.4.1 Conservation versus accessibility

Although the lists changed when individuals knew the views of other panellists there was consistent agreement that conservation had the highest priority. It was also clear that recreation had a low priority in these establishments. This shows a determination to protect the heritage for future generations above other uses of the attraction.

Other authors also saw conservation as paramount. Croft noted that heritage managers see themselves as guardians of the heritage and do not even see themselves as a part of the “tourism business” (Croft 1994). He was a Regional Director for the National Trust in Scotland, quoting directly from his own staff. He went on to state that this attitude is
unsustainable: “There is no point in conserving buildings and contents for the benefit of the nation if people cannot have access to them” (Croft 1994, p.178).

Garrod and Fyall found in their study that, like Croft, heritage managers place accessibility second only to conserving the heritage. They state that if “people are prevented from experiencing a heritage asset; it can no longer be considered part of their heritage” (Garrod and Fyall 2000, p.691).

This is the quandary in which managers of historic properties find themselves. They must allow access for the public to ensure that the efforts of conservation are appreciated and recognised by the public, yet must also restrict this access to protect the heritage asset.

Figures quoted from the British Tourist Authority and English Tourist Board in the Policy Studies Institute report carried out by Casey, Dunlop and Selwood showed that there were 68 million visitors to historic properties in 1993 (Casey, Dunlop and Selwood 1996) (See: 1.7.2.) Some establishments do not give visitor figures, so it can be concluded that overall visitor numbers are certainly higher. The same report states that some members of the Historic Houses Association indicated that it was uneconomical to open their houses to the public as the damage caused costs more to rectify than the income generated from opening. Some properties prefer to concentrate on commercial activities, including private functions and corporate entertainment, to minimise wear and tear by restricting visitor numbers and allowing access to fewer parts of the property. The problem of conserving the heritage has given rise to different methods being used by owners and managers to conserve the property, while still giving some access to the public.

Despite the pressures of rising visitor numbers, owners of historic properties have developed some simple techniques to combat these problems. The first and major one is closing houses to the public during the winter months. This happens in most historic properties to allow maintenance to be carried out and also ensures that the inclement
weather does not have an adverse effect on interiors. This can occur through the transportation of dirt and wet into the house from outside via visitors’ shoes. This is supported by research carried out at the University of East Anglia on behalf of the National Trust that says that visitors bring in 95% of the dust found in properties during the spring and summer periods (de Bruxelles 2002, p.3).

Allfrey in his study on the preservation of Brodsworth Hall, an English Heritage property, states “the house is open only during the summer season to minimise the hours of exposure to sources of damage” (Allfrey 1999, p.123).

Although not explicitly stating that the winter months would see a greater level of damage to the properties Allfrey’s statement does imply that there is a belief at properties that this is the case.

Information in the National Trust Handbook shows that most properties close in October and do not reopen until Easter of the following year (National Trust 2007b). This allows owners/managers of properties to carry out all those tasks that could not be performed during the summer months due to the demands of visitors. Tim Faulkner, General Manager of Powderham Castle in Devon states that at the end of October nearly all furniture is moved into “sleep mode” for the winter (Faulkner 2001). He goes on to note that the closure in the winter months is necessary to enable them to carry out all the jobs not completed in the summer. This includes repairs and restoration on the house, and if the year has been financially successful, then possibly redecoration or other improvements. It can be deduced that shutting for the winter months is an important aspect of the working year as it enables owners/managers of historic properties to maintain and protect the property for future visitors.

Another method adopted by historic properties is the use of timed passes to ease the throughput of visitors. Anglesey Abbey, a National Trust property, operates a timed system on certain days of the week to regulate the numbers of people walking through the small corridors of the property (National Trust 2007b). Privately owned properties
where the family is still resident often only allow access as a part of a tour. Prideaux Place in Cornwall is one such property. Here tours are scheduled to limit the duration of a visit and numbers of people going through the property at any one time (Hudson’s 2002). This tactic both protects the fabric of the building through limiting visitor numbers and allows the property to encourage visitors to look at other aspects of the property, such as the garden and shop.

2.4.2 Recreational activities

Garrod and Fyall’s research showed that recreation was viewed as seventh in the priorities of heritage attraction managers. The panel felt that educating users was better than offering them entertainment (Garrod and Fyall 2000). It is interesting that they hold this view considering some of the activities that take place at heritage attractions. Previously mentioned above is Prideaux Place in Cornwall where the use of tours controls the numbers of visitors walking through the property. While they are waiting for the next tour there are other activities available for them. These are principally, a walk around the grounds, lunch in the tearooms or viewing the merchandise available (Hudson’s 2002). None of these are notably educational, but they are certainly leisure activities.

It can further be argued that increasing activity by those managing heritage attractions has been in recreational activities. Historic houses now include provision for weddings, banquets and fairs of all description, for example in 1999 Castle Ashby in Northamptonshire diversified its portfolio of activities by allowing weddings and conferences to be held at the property (Watson-Smyth 1999). Changes in UK law have resulted in licences being granted for civil wedding ceremonies at many establishments across the country. Some historic houses have taken advantage of this. Many others have followed suit including Belvoir Castle in Leicestershire and Arbury Hall in Warwickshire who ‘sell’ these activities in their brochures (Belvoir Castle 2001), (Arbury Hall 2001). Arbury Hall is the most notable of these as it focuses on corporate events, and only opens its doors to the general public on bank holidays. These activities
can be viewed as recreational and social activities, while catering for the corporate sector. They may have some educational merit, for example a corporate away day, but principally they are noted as leisure or commercial activities. Exploitation of the property for commercial purposes is becoming more important to historic houses as it is a lucrative market.

Property managers placed education above recreational facilities in the survey conducted by Garrod and Fyall (Garrod and Fyall 2000). It is obvious from the survey that respondents felt recreation had a low priority amongst their activities, but the marketing of properties to the public presents a different picture.

Brochures from Arbury Hall and Belvoir Castle indicate the level of corporate hospitality that is offered at some properties. The literature shows many more examples of this. The Historic House Association lists events at properties in its own magazine (Historic Houses Association 2002b, p.52-3). The list includes antiques fairs, plant fairs, craft fairs, gardening courses, Easter egg hunts, horse trials and many more. This cornucopia of activities at historic properties is extended even further when the National Trust event guides are consulted. Activities such as Peter Rabbit trails, triathlons, musical concerts, gardening tours, vintage car rallies and evenings with the Poet Laureate are found amongst the lists (National Trust 2002a). Many and varied events for the public take place at historic houses many of which could be construed as leisure activities. The public face of these organisations is one of how to spend your leisure time.

2.4.3 ‘Events’ at historic houses

Events fulfil a wide range of objectives for historic houses. Writing on special events at historic houses in the USA Robert Janiskee argued that managers “use events to generate publicity, attract crowds, create new entertainment forms, enhance education, preserve folk culture, celebrate ethnic diversity and raise money” (Janiskee 1996, p.398). He further states that with the use of events historic houses are “packaging a
leisure product for consumption” (Janiskee 1996, p.399). This supports the point made above that most activities are leisure based. Although his article describes events at houses in the USA, his description of the types of activities is relevant to the UK. A major objective of his study was to broadly categorise events that occurred at properties. His conclusion was that they fell into three categories. These were community festivals, stand-alone house tours and living history portrayals (Janiskee 1996).

Community festivals, according to Janiskee, are organised by local agencies to provide events for the public with historic houses as a backdrop. Although the organising agency in the UK will be the managers or owners of the property, the result is the same. The events at properties listed previously that have been advertised by both the National Trust and the Historic Houses Association are intended to attract the local population. The National Trust advertises its events through regional newsletters to emphasise this. Many of the events are concerts, vintage car rallies, or children’s activities (National Trust 2002a). These fall into Janiskee’s categories because the house is not the centre of attention, the event is. At many events, for example concerts, the house is not open during the event.

His second category is house tours. Most heritage attractions in the UK have these as a standard attraction for visitors. The National Trust Handbook for members gives details on the accessibility of houses, including opening times and which parts of the property are open to viewing (National Trust 2007b). Janiskee indicates that these are deemed to be special events at US historic houses (Janiskee 1996). In the UK these are everyday activities and part of the attraction of visiting historic houses; however properties do hold additional tours whereby visitors can view parts of properties usually inaccessible to the public (National Trust 2002a).

The third category described by Janiskee was living history portrayals. The experiences he describes in the USA come under the following headings:
1. holiday celebrations  
2. ceremonies, rituals and parties  
3. historic event re-enactments  
4. vernacular skills and crafts.

These also take place in the United Kingdom. Rockingham Castle in Northamptonshire holds a Civil War re-enactment in May in conjunction with the Sealed Knot Society² (Historic Houses Association 2002b). Many properties hold events where staff are dressed up to welcome visitors. These are especially notable at Easter when houses open for the first time after the winter shutdown in the UK (Historic Houses Association 2002b). Craft fairs and similar events are very popular in the UK. Janiskee describes these events as largely “portraying the everyday aspects of bygone lifestyles” (Janiskee 1996, p.409).

He further describes them as being themed. In the UK local craftsmen and artisans display and sell their work at craft fairs. The main reason is that for them it is a way to sell their works with the marketing carried out by the property. The annual country fair at Belvoir Castle in Leicestershire attracts over 150 of these trade and rural craft stands, all with the backdrop of country sports and pastimes (Belvoir Castle 2002). Despite the similarities in the literature between US events and the UK there is a palpable difference between the two. US events appear from Janiskee’s account to be largely community based. Those in the UK are based on countryside activities. This is not surprising as historic houses are often part of a larger estate firmly rooted in the countryside. Belvoir Castle is one such estate; Chatsworth House in Derbyshire and Burghley House in Lincolnshire are similar establishments (Hudson 2002).

Events are taking place at properties all over the UK, despite what was said by managers, owners or curators to Garrod and Fyall which indicated that they gave it a low priority. All the evidence from the literature indicates that activities are marketed to attract people to properties, yet those running properties see it as a low priority.

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² The Sealed Knot Society re-enacts battles and portrays life from the English Civil War period.
Although the literature indicates a substantial amount of marketing to attract the public to properties it must be borne in mind that managers of properties have stated that conservation is their highest priority. It is unlikely therefore that they would place attracting the public for recreational purposes high on their list. The pressure on them to balance annual budgets through any means at their disposal would be a strong reason for holding events to attract the public in the grounds of houses.

John Butler, in a report for the Policy Studies Institute, investigated the work of historic country houses. He enumerates the following as leisure activities:

1. Offering important collections of paintings
2. Costume exhibitions
3. Memorabilia of historic figures
4. Museums of cars, tractors etc.
5. Model railways
6. Adventure playgrounds (Butler 1980, p.15).

He describes these as ‘installed facilities’, but houses customarily offer activities such as walking, fishing, picnicking, riding and looking at gardens (Butler 1980). This list of activities is not exhaustive. Butler was investigating houses from a financial viewpoint and as such he was describing leisure activities as a means of creating revenue and drawing the public to use the house. Although his survey focused on the financial characteristics of historic houses he clearly shows the wide variety of house activities. It can also be seen that some of these have a high educational value, such as the costume exhibitions and art collections and education is of utmost importance to historic houses as this is a major way in which they link to the public. Garrod and Fyall’s work showed that the priorities placed above recreation are education, relevance, finance and quality (Garrod and Fyall 2000).
2.4.4 Education at historic houses

Education was the third highest priority, being ranked below conservation and accessibility according to the participants in Garrod and Fyall’s research (Garrod and Fyall 2000). Historic houses have been concerned with education for a long time. The International Heritage Conference held in 1977 had education at historic houses as one of its themes. Alan Rogers stated at this conference that there were three purposes to education for historic houses. He described them as:

1. Making people aware of their environment
2. Fostering an appreciation and understanding of houses
3. Fostering concern for the protection of the heritage (British Tourist Authority 1977, p.25).

These values are still relevant today. Garrod and Fyall note that visitors “must be able to understand it’s (the house) nature and significance, including why it should be conserved” (Garrod and Fyall 2000, p.691).

They further advocate the full use of interpretational techniques to achieve this. John Hodgson speaking at the International Heritage Conference in 1977 advocated new ways of presenting historic houses to the public as well as the traditional tour guides and guide books (British Tourist Authority 1977, p.31). Education is central to the activities of properties. The National Trust devotes a section to education and lifelong learning in its annual report. It reports on the work carried out by the trust in collaboration with schools, community groups and adult education. It details many programmes of activities including dance, painting, birdwatching, sailing and cookery (National Trust 2002b, p.19). Education is central to the activities of a historic house because it gives the public an understanding of properties’ histories and makes the experience more rewarding and enthuses an understanding of historic houses both now and for the future. According to Garrod and Fyall accessibility is achieved by the appreciation of the heritage asset through education (Garrod and Fyall 2000). This is a
belief firmly held by those engaged in heritage tourism. The Historic Houses Association held a Heritage Education Conference in 2001 at Blenheim Palace. The conference facilitated the sharing of good practice and a booklet entitled *Historic House Education: Information for HHA members* has been published (Historic Houses Association 2001b, p.17). This clearly indicates the importance attached to education by property owners. More importantly it mirrors the priorities of the public and of English Heritage. The Report published in 2000 entitled *Power of place: the future of the historic environment* was led by English Heritage, but was overseen by an independent Steering Group. It surveyed the general public and also consulted the sector to produce a report that gave the views of the nation as a whole. 98% of those surveyed stated that the heritage is a vital educational asset (Historic Environment Review Steering Group 2000, p.4).

Garrod and Fyall argue that the best way to educate people is to make the experience entertaining as well (Garrod and Fyall 2000, p.691). This may account for the difference in the perception of education and recreation by property managers in Garrod and Fyall’s work. Education was a high priority in their work, while recreation was low. It seems to be clear that to attract visitors to properties as described above recreational facilities must be offered, but it is also clear that many of them are also educational in their aspects. The argument can be put forward that the two have become less distinguishable at historic house events.

It is difficult to draw clear lines between education and recreation in an economic climate where heritage tourism is perceived as a commodity. Other priorities discussed in Garrod and Fyall’s work reflect the difficulty in drawing distinct lines between activities and their impact upon each other and the historic house. There are conflicts between education and recreation, and also conservation and accessibility. These aspects both conflict with each other, but also complement each other. That is why the work at historic houses is both difficult and rewarding for those responsible, yet provides considerable challenges.
2.5 Museums and information management

As already stated previously in the literature review there are few texts available relating to the heritage industry and information needs or even the use of information. One area of the larger heritage industry that does have related activities, that can provide some benefits for the historic houses this research is targeting, is that of the museums sector. Unlike many areas of the heritage sector the museums sector has been examined by Orna and Pettitt, who due to a long standing interest in museums, have brought to bear information management experience to provide guidance on the management of information at museums.

Many of the suggestions for good practice that Orna and Pettitt make are transferable to other organisations and could be adopted by historic houses in some measure (Orna and Pettitt 1998). As discussed previously in section 2.1.3 many historic houses have acquired a substantial collection of artefacts that are an integral part of the attraction of the historic property. Information related to artefacts can be recorded, indexed and then made available for users. One difference here should be noted and that museums are a collection of artefacts that often have different owners and this information is key to their activities. Historic houses will only have one owner and will have recorded many of their artefacts for insurance purposes. The level of detail recorded is key, as if sufficient history of artefacts is also recorded then this can provide the basis of information given to the public that would enhance their enjoyment and understanding when they visit the property.

Another area where there is considerable overlap is that of education. As discussed above in section 2.4.4 education is an important factor in the activities at historic houses and is one that museums also routinely incorporate to make their collections relevant to the visiting public. Increasingly historic houses are able to focus on schools and other members of the public to provide a background to the study of history in the UK and to also ensure that properties remain relevant in the present day.
Where they differ is the range of activities that take place at historic houses. A museum is curating a collection and using this collection to educate and to generate income to ensure long term survival. Historic houses will often have some of the characteristics of museums, but typically have many additional functions attached to their property ranging from land management through to civil functions.

One of the reasons that museums have evolved and are in some senses operating more effectively than historic houses can partially be explained by what Orna and Pettitt describes as a narrowing between the museum and library professions (Orna and Pettitt 1998). Certainly organisations such as Resource (See: 2.1.4), and its successor the Museums, Libraries and Archives Council (Museums, Libraries and Archives Council 2006) have endeavoured over recent years to bring the communities closer together and helped to share good practice and facilitate improvement. Historic houses do not have this advantage and consequently information management is not seen as a priority, although this is unsurprising as the literature suggested earlier that priorities within the heritage sector were oriented towards the conservation of the property and ensuring it would remain for generations to come.

Although the heritage sector does have a wealth of organisations that can help support the running of properties, including English Heritage, local authorities, the Countryside Commission and others, there is no central organising body that could promote good practice and ensure that it was shared across the sector. The fact that many historic houses are privately owned and run, as noted in section 2.1.3, means that they have to manage their own affairs and consequently they rely on their own knowledge and contacts. This will be discussed further in the literature review in section 2.7 by reviewing the management of knowledge and the importance of tacit knowledge to their activities. This goes beyond Orna and Pettitt’s discussion of information and knowledge management (Orna and Pettitt 1998).

Museums have an inherent advantage over historic houses because comparatively few of them are privately owned. Many are attached to government organisations or local
authorities and as such are afforded both support and some protection from the market. Orna and Pettitt in their text review Callendar House in Falkirk, which is a local authority run museum and has the support of local government which gives them advantages over historic houses (Orna and Pettitt 1998). Others are attached to known brands or iconic figures, such as the RAF Museum and the Victoria and Albert Museum which attract numbers due to their historic background and prestige. Additionally organisations in the sector such as the Museums, Libraries and Archives Council support the dissemination of good practice.

Another key difference historic house is that museums normally have specialist curators in post. As in libraries where professional librarians ensure that good practice and currency in that practice is followed, curators ensure that museums keep pace with developments. In historic houses this is often left to private owners who are trying to manage different facets of the business as well as the management of information, and have great difficulty in keeping pace with new developments in any area, least of all in the management of information. This is key, as where historic houses could improve their information management by following good practice in the field by performing an audit and the introducing an information policy, this will only be possible if they have access to professional advice and support. Some historic properties could afford to take this route but the sector is full of inequalities with houses enjoying different levels of standing and support in the sector, the nature of which will emerge from the investigations to follow.

One of the key points that consistently comes across in Orna and Pettitt’s work on museums and the improvement observed in some of their case studies they describe is the move from manual systems for the management of information to the use of computerised systems. The advantages of this cannot be underestimated and historic houses need to take advantage of new technologies to develop their business. It will be important to note what part computers play in the use of information at historic houses.
2.6 Small to Medium Sized Businesses (SMEs)

Small businesses are known as SMEs or small to medium sized enterprises. Here they will be termed SMEs or just small businesses. This section reviews the literature regarding small businesses as there may be some comparisons between small businesses and historic houses that may provide useful information for the study. Further consideration, providing more direct comparisons between SMEs and historic houses is presented in chapter 4.

The definition of small businesses used by the Bolton Report states:

“Firstly in economic terms, a small firm is one that has a relatively small share of its market. Secondly, an essential characteristic of a small firm is that it is managed by its owners or part-owners in a personalized way, and not through the medium of a formalized management structure. Thirdly, it is also independent in the sense that it does not form part of a larger enterprise and that the owner-managers should be free from outside control in taking their principal decisions” (Department for Trade and Industry 1971, p.1).

It is this definition that indicates that there is at least the possibility of some similarities of practice occurring between small businesses and historic houses. SMEs and historic houses do indeed have owner-managers who are responsible for their day to day running. They are also free, on the whole, to make their own decisions, and mistakes, regarding the management of the business or property. Consequently further consideration must be given to aspects of small businesses that have some bearing on aspects of the research.

The owner is directive and clearly in charge within a small business. This echoes a stated characteristic of the small business which is that the “owner is the manager at the strategic apex” (Wong and Aspinwall 2004, p.50). Other commentators on small businesses have echoed these characteristics of small businesses noting that “few
people are involved in either significant or critical decision making” (Williams and Bradlaw 2001, p.279) and a “lack of management experience and capability, a lack of specialist services in place to advise management, and a lack of time to consider the development of the firm” (Williams and Bradlaw 2001, p.279).

Small businesses are often prompted by the birth of an idea or a service that the owner may be proficient at. Whether they do or do not have management experience can be secondary as noted above. Historic houses can suffer from the same malaise where the individual in charge could be there by an accident of birth or through employment. Their ability to manage is often secondary to their skills in preserving the idea. Additionally as also noted above they have few individuals that they can turn to who have any more experience than they do within their social network.

Interestingly Boswell notes that small firms have difficulties with management succession. The owner-manager can often drive a firm with their own “strength and determination” and this can present problems for the continuation of the firm. In some cases there were family members who would carry on with the business, but of 16 businesses, ten were exhibiting difficulties in handing on control of the firm (Boswell 1972, p.77-95). With historic houses the succession criteria are already pre-determined with many properties and with others managers are appointed with the appropriate support available.

Research on the strategic orientation of small firms indicates that there are four generic groups of SMEs. These being:

1. Growth Firms
2. Survival oriented firms
3. Exit oriented firms
Two of these are most likely to be family controlled, those related to survival and control. Both growth and exit oriented firms are intended to either keep growing or to be a vehicle for retirement or change. Control oriented firms are those firms where the emphasis is maintaining the status quo is paramount and the firm or owner is no longer concerned with growth, having achieved what they set out to do. Survival oriented firms are the most likely to be family owned and are often older and more established. This last also echoes many historic houses where the property is maintained for generations to come and for the nation, making survival the key characteristic. This last however, according to Poutziouris, accounts for only 16% of the sector and most therefore are not survival oriented (Poutziouris 2003).

The Bolton Report further stated the following as being necessary for the management of small firms:

1. Finance
2. Costing and control information
3. Organisation
4. Marketing
5. Information use and retrieval
6. Personnel management
7. Technological change
8. Production scheduling and control (Department for Trade and Industry 1971, p.113-4).

Even without detailed examination of these factors it is clear that they will have, at least, something in common with historic houses. What is clear from the list above is that the use of information and the retrieval of that information are noted as key to the successful small business. Whether small businesses are able to take advantage of information will depend on the skillset of the owner-manager of the small firm. The list provided above by the Bolton report indicates that the work of the small firm covers a very wide area and over time has become even more difficult for one person to do on
their own. Stanworth and Gray note that in the twenty years since the Bolton Report some areas of the companies’ operations have been given to other individuals and the characteristic of owner/manager is becoming open to challenge (Stanworth and Gray 1991). However the importance of the owner-manager is still paramount and the “top managers are often the founders and owners” (Ottesen, Foss and Gronhaug 2004, p.593-607).

Down argues that “small firm managers’ skills and knowledge develop largely through their existing social relationships within their organizations and with other businesses and organizations in a network of relations” (Down 1999, p.268). Networking is therefore a key skill for small business owners, and their level of knowledge can depend to some extent on their network. Socialisation is key here and in the same way that historic houses can be a part of their local community, small businesses must also socialise to keep themselves informed. Work by Ottesen, Foss and Gronhaug indicated that networking performed by SME managers was key to their information gathering and understanding of their environment and consequently their market. Surprisingly they found that the managers studied had poor conceptions of their environment and could make disastrous decisions. This was only ameliorated by managers discussing issues with colleagues at the firm (Ottesen, Foss and Gronhaug 2004). This indicates a need for support in the gathering of information by those managing SMEs and a very real need for training.

A British Library Research and Development Department (BLRDD) Report into the information needs of small retail and service firms found that most trade locally. Twenty-six percent operated within 5 miles and thirty-three per cent within 10 miles, while only twenty-five per cent operated beyond 25 miles (Capital Planning Information 1985). It characterises the nature of small businesses showing the importance of local networking. The report also stated that sixty three per cent of the same businesses found the “Yellow Pages” and “Thomson Local” indispensable, reiterating their reliance on local resources.
Other characteristics of small businesses are that “few people are involved in either significant or critical decision making” and a “lack of management experience and capability, a lack of specialist services in place to advise management, and a lack of time to consider the development of the firm” (Williams and Bradlaw 2001, p.279).

This last comment regarding time is another factor that affects small businesses. Owners spend an inordinate amount of time managing their business, creating considerable pressure on themselves and their families. Williams and Bradlaw also note that there is no advice available. However, this is not necessarily the case, as the BLRDD discovered there were a number of agencies providing support ranging from the Department of Trade and Industry, Regional Development Agencies to Local Authority Small Firms Services; however owners are likely to be unaware of what is available to them leading to low levels of use for some agencies (Capital Planning Information 1985).

The inadequacies of the schemes are put into stark contrast by the comment of Chaston, Badger and Sadler-Smith that “in the case of training schemes it has proved extremely difficult to identify any positive relationship between funds expended and improvement in SME sector performance” (Chaston, Badger and Sadler-Smith 1999, p.191-203).

Other research has indicated that trade associations are of importance to the managers of SMEs (Capital Planning Information 1985) and that these associations could be used to channel both training and information (Down 1999). However it must be doubted whether the results would be any more beneficial than the schemes that have been put forward by Government agencies since the Bolton Report. Additionally trade associations will also include the membership of larger firms that could affect the content and delivery of any proposed training schemes.

It would be remiss if this research did not point out that many small businesses are also not primarily motivated by money. Stanworth and Gray, reviewing the Bolton Report, stated:
“Money, it was suggested, was not their (small businesses) prime source of motivation: there is a quality of life issue; personal involvement in owning and managing one’s own firm led to a greater satisfaction on a number of fronts all associated with the notion of ‘independence’” (Stanworth and Gray 1991, p.209).

Despite this a small firm must do more than simply balance its books to exist. To make the firm solvent they must be able to provide a surplus to ensure that the firm stays afloat and that the owners are can also live on the proceeds, being able to clothe and feed their families. Interestingly Templeton and Wootton found that accountants were held in high regard by small businesses, indicating the importance of the financial aspects of running a business to owners. Despite this however it was noted that they were little used (Templeman and Wootton 1987, p.74). This could well be due to the cost associated with using accountants who might be considerable for a small firm.

A report on information and the small firm in retailing and services by Capital Planning Information analysed six areas of information needs for these businesses (Capital Planning Information 1985). These were:

1. Management
2. Financial
3. Markets
4. Premises
5. Employment

These are discussed more fully in chapter 4 in comparison with historic houses, but the list clearly displays that SMEs require information on aspects of running the organisation, many of which would not be out of place at a historic house. Staffing issues and references to legal obligations and maintenance of the establishment clearly seem to be relevant to all. What has not been addressed by the survey is the specialist
nature of the businesses. In the same way that historic houses are a ‘special’ sector, each business will have its own specialism, although it may be more specific and less diverse than at historic properties.

The management of knowledge or knowledge management (KM) is discussed further in the following section, but there is some literature in relation to small businesses that reviews their use of information and KM practices. Wong and Aspinall noted that “small businesses generally lack a proper understanding of KM – mostly in terms of key concepts and small businesses have been slow in adopting formal and systematic KM practices – it does not feature highly as an important agenda in most of them” (Wong and Aspinwall 2004, p.50).

These comments reflect other research in the field, such as McAdam and Reid who compared knowledge management perceptions in both large organisations and SMEs. Their findings indicated that while large organisations were developing KM practices, small businesses focused on their market rather than internal efficiencies (McAdam and Reid 2004). The nature of small businesses and their control mechanisms, having small numbers of employees, and an owner-manager who controls the decision making, largely overrides the need for formal control systems such as communication and information. Wong and Aspinwall noted that owner-managers were much closer to delivery of the product and involved on a daily basis, consequently their knowledge of the firm is more complete and their ability to share information is also easier (Wong and Aspinwall 2004). However this does not mean this actually happens and Matlay noted that although learning takes place in the majority of small firms, knowledge is not managed proactively or strategically (Matlay 2000). SMEs largely are focusing on their market goals rather than strategic management, including the use of KM.

SMEs are restricted in the creation of knowledge systems by their lack of financial resources. Additionally the majority of information may be stored in the heads of the owner-manager or at best the heads of a few key employees. Wong and Aspinwall argue that because information is stored in only a few heads then, knowledge in small
firms is largely tacit and is more easily recognised and organised, as colleagues will either be aware of the experts within their firm or a corporate listing can help to guide them (Wong and Aspinwall 2004). What is less feasible however, are the resources to make the tacit knowledge explicit. Noteboom states that SMEs have a lesser degree of absorptive capacity for knowledge transfer because assumptions are made about colleagues own knowledge (Noteboom 2001). Further discussion on tacit knowledge occurs in the next section.

2.7 Knowledge Management and Tacit Knowledge

The phrase ‘knowledge management’ has been used for some time in the library and information science community and in many other disciplines. There is no agreed definition across them all although some have attempted it. However there are influential works that have helped to shape the discipline and although the importance of knowledge management is noted for this study, discussions will focus on tacit knowledge due to the nature of both historic houses and the activities they undertake. Historic houses have been run by succeeding generations and knowledge has been handed from generation to generation. Owners have tacit knowledge of their personal and historic surroundings, which relate to the property and additionally their own memories.

Influential scholars theorising on knowledge management include Nonaka and Takeuchi (Nonaka and Takeuchi 1995) and (Probst et al 2000) who introduced elements of knowledge to describe the components of knowledge.
Nonaka and Takeuchi discussed content or knowledge, created by a number of modes as seen in figure 2.3. Sympathised knowledge can be shared ideas and ways of working created by socialisation. In the context of historic houses this is important as relationships amongst home owners are based on hereditary and historical factors that have evolved over time. Socialisation plays a role in spreading the knowledge throughout the organisation. Where the property is owned by a family then the spread of knowledge from tacit to explicit is internalised by individuals limited to the family or others within the same social network. This can lead to externalisation where the individual, through social interactions or other means, obtains context specific knowledge from others that can be conceptualised. This is of relevance to historic houses and their dynasties, but is often difficult to formulate and express.

Systemic knowledge involves processes and plans utilised in the running of organisations. In the case of historic houses this can depend on many factors, such as the support a property receives from other sources or the resources within the family itself, including the education they have undertaken.
Probst describes the building blocks of knowledge management, identifying the processes involved in managing knowledge, (identification, acquisition, development, sharing, utilisation and retention), but more importantly he stresses that having clear goals will determine the success of the processes in the first instance (Probst 2000). The assessment stage will determine whether those goals were achieved and how well the process was used. This is important for historic houses as there is an assumption made at the beginning of the process that individuals know where to start and how to determine their knowledge goals. This is unlikely to be the case, because even in the most professional arenas Probst states that “the organisational knowledge aspect is still disregarded when goals are formulated” (Probst 2000, p.28-37).

If major companies are neglecting to set their knowledge goals, why should those in the heritage sector be any different? It is more probable that the heritage sector is even more disadvantaged.

Karl Wiig (Wiig 1990) built on their work to devise the “Institutional knowledge evolution cycle” which is comprised of the following five parts:

1) Knowledge development
2) Knowledge acquisition
3) Knowledge refinement
4) Knowledge distribution and deployment
5) Knowledge leveraging.

The first of these is developed through learning and the acquisition of information from other sources; the second is the collection of data and storing it for later reuse; the third is the organisation of the data to make it available; the fourth is the distribution of the information through training programs, systems or other means; the fifth is the application of knowledge as the basis for further learning. The cycle is recognisable to many, but what needs to be addressed for historic houses is how this can happen for them. For many it is their home and how many people actually adopt knowledge
management practices within their own homes consciously? Most people rely on their own knowledge gained through experience, while many learn through knowledge handed to them from their parents, whether this is good or bad. Consequently focus needs to be given to the tacit knowledge retained by those running historic houses and how this can be made explicit.

2.7.1 Knowledge Warehouse Paradigm

Kuhlen discusses the knowledge warehouse paradigm which built on the models above and has the following stages:

1. Collect existing knowledge
2. Transform tacit knowledge into explicit knowledge
3. Store knowledge in databases
4. Make knowledge available by providing access through traditional retrieval methods
5. Make knowledge user friendly and adaptable by presenting in flexible forms of visualisation (Kuhlen 2004, p.21-38).

The heritage sector has over time collected many artefacts and history surrounding the property and its contents. Passed from generation to generation considerable emphasis needs to be placed on tacit knowledge and whether it is, or can be, made explicit such that future generations have access to the information to supplement their knowledge. It is questionable how much is actually recorded and consequently we will look further at tacit knowledge to determine its importance in the heritage sector.
2.7.2 Tacit Knowledge

Nonaka and Takeuchi conducted their research within Japanese companies especially in the automotive field, but some notable concepts are relevant to historic houses. They stated that “interaction between tacit and explicit knowledge is performed by the individual” (Nonaka and Takeuchi 1995, p.225). Individuals at historic houses, especially the owners, are guardians of the knowledge regarding that property. Some they may record, yet there will be many things that they do not realise are important or, alternatively, are things that they simply do on a day to day basis. Again Nonaka and Takeuchi make the comment: “personal and physical experience is equally as valuable as indirect, intellectual abstraction” (Nonaka and Takeuchi 1995, p.239). This emphasises the point made in 2.7.1 and 2.7.2 that the activities undertaken, functions attended and interactions with their family and social network by the individual form a part of the tacit knowledge they hold internally that supports the running of the property. Taken a step further we find that Nonaka and Takeuchi further add in their view that “human knowledge is created and expanded through social interaction” (Nonaka and Takeuchi 1995, p.238). This reinforces the discussion above regarding the social networks and interactions that forms a part of the background to the tacit knowledge held by individuals at historic houses.

The importance of tacit knowledge is made clear by Polanyi (Polanyi 1967) when he discusses ‘tacit knowing’. He describes a number of aspects of tacit knowing, including functional, phenomenal, semantic and ontological which combine to form the individual’s tacit knowledge based on their own bodies and experiences. He states:

“the skill of a driver cannot be replaced by a through schooling in the theory of the motorcar; the knowledge I have of my own body differs from the knowledge of its physiology; and the rules of rhyming and prosody do not tell me what a poem told me, without any knowledge of its rules.” (Polanyi 1967, p 20)
Tacit knowing is difficult to quantify because it relies on actions, activities and experiences that the individual undertakes and forms a part of their tacit knowledge. It is impossible to pass this on in its entirety as others must also experience things for themselves in order to create tacit knowledge. Wagner-Dobler when discussing knowledge management argues that “tacit knowledge should not be conceived of as something inferior” (Wagner-Dobler 2004, p.39-46).

This is key because information at historic houses is often “owned” by the individuals managing the property, especially where the family owns it. Tacit knowledge, according to Wagner-Dobler, is passed on by:

1. Personal conversations
2. Story telling

Historic houses are pockets of the country’s history that allow visitors to see what has occurred previously and to place the future in context. This relies not only on historical records that properties may have, as this would be explicit knowledge recorded for future generations, but also on the tacit knowledge of the individuals who are running the property and would be able to place the recorded information in context, such as the sights and sounds that would be linked to the data in their minds, or whether a course of action previously recorded has had, over time, a positive or negative effect on the property. Wagner-Dobler, although writing in a library and information science context, has indicated the manner in which historic houses can pass on information from generation to generation. In any context children imitate their parents and attempt to emulate or improve on what the previous generation did.

Polanyi also discusses the importance of communication within tacit knowledge. He argues that science forms part of cultural life and that tacit coefficients through which systems are understood and upheld, confirm factual truth for many. He argues that these coefficients form part of a cultural life that is shared by a community. This has echoes
for the historic house community where there are shared systems and beliefs that uphold a way of life that has survived generations and forms a part of the tacit knowledge of individuals within that community. Communication plays a significant role within communities and historic house owners would be no exception. Polyani states:

“The combined action of authority and trust which underlies both the learning of language and its use for carrying messages, is a simplified instance of a process which enters into the whole transmission of culture to succeeding generations.” (Polanyi 1958, p.207)

Although Polanyi is discussing society in general and the actions and the rules that underlie society, the same rules apply to the historic house sector. The knowledge of the property’s construction over centuries, and the paintings and artefacts held within, is passed from generation to generation by a process of communication flowing from adult to child in the first instance, where Polanyi indicates that one person places an exceptional degree of confidence in the other, much as an apprentice would do to their master or a student to their teacher. This is further emphasised by the community in which they live whereby the ‘apprentice’ or next generation continues throughout their life to place confidence from those in the community in which they are a member. Jashapara states that “we are not neutral observers and are informed by our experiences and cultural backgrounds” (Jashapara 2004, p.293).

The individual therefore is imbued with the sights and sounds of their upbringing and the people who contribute to this. Consequently the social networks to which they are imbued form an integral part of their understanding and the way in which they take care of their property.
2.7.3 Making tacit knowledge explicit

Previously we saw in the model presented by Nonaka and Takeuchi (fig. 2.3) that socialisation was important to organisations to ensure the spread of knowledge and to some extent can apply to historic houses, due to the nature of social networks. The other paradigms do not have such an impact on the sector, such as internalisation and combination. However externalisation can have an impact but only if tacit knowledge can be made explicit and transferred as knowledge.

Nonaka and Takeuchi indicated how tacit knowledge can be made explicit through a number of means. They describe how a number of processes are used to express tacit knowledge as explicit (Nonaka and Takeuchi 1995).

They indicate that there are 3 distinct ways that this might happen. Notionally inexpressible information could be expressed through figurative language and symbolism. This would be specific to any given sector or industry. Metaphors or analogies play a key role as they can help reveal hidden tacit knowledge in a group. Making comparisons of this nature can help the organisation as information held by an individual can be transferred by expressing it in terms that others understand. In particular, heritage and houses have their own community and shared knowledge.

Secondly dissemination and the sharing of one’s own knowledge with others was important. Nonaka and Takeuchi state “the organization cannot create knowledge on its own without the initiative of the individual and the interaction that takes place within the group” (Nonaka and Takeuchi 1995, p.12-14). Therefore one of the keys to making tacit knowledge explicit is for the individual to be part of a group or network to ensure that tacit knowledge held by certain individuals to be disseminated.

Finally Nonaka and Takeuchi indicate that new knowledge is born amidst ambiguity and redundancy. Valid approaches to knowledge creation are discovered by following a number of routes, some of which may arise as the individual or organisation is unsure
of which option to take, due to no previous knowledge of similar situations and additionally it can also arise from using methods that turn out to be redundant or not useful. These are valid methods of knowledge discovery and creation. Interestingly Nonaka and Takeuchi stated “the West tend to emphasize the importance of explicit knowledge, the Japanese put more emphasis on tacit knowledge” (Nonaka and Takeuchi 1995, p.12-14). This comment indicates the West’s predilection with things that have been stated as fact and in many cases have been published or written down as a statement of fact. What is being conveyed here is that culturally Japanese organisations give more credence to the individual and what personal or tacit knowledge they can bring with them to solve issues that they may have. Western companies do not necessarily have this same ethos, but the nature and structure of the heritage sector is likely to give more prominence to this due to the nature of networks, within and without of heritage organisations, can give rise to different methods of knowledge discovery.

2.7.4 Levels and types of knowledge

Wiig discusses levels and types of knowledge and it is worth consideration as they give a clearer picture of how knowledge is dealt with in many contexts. He describes three levels of knowledge:

1. Public
2. Expert

The first is found in the public domain, while the second is shared amongst experts in a particular sector through channels that have been developed by those experts. The last is knowledge held within the person and may not be shared due to a lack of means of making it explicit. The heritage sector is at a disadvantage as the sector has not emerged as a defined research area in the same way as physics or even library and information science. Wiig further describes four types of knowledge:
1. Facts and data
2. Views and concepts
3. Working hypotheses

When applied to personal knowledge we see observations and privately held data in the facts area, while conceptual images of particular situations, particularly social in the heritage sector firmly belong in views. In hypotheses individuals will hold their beliefs and equally importantly their misconceptions and in reasoning strategies will be their intuition. For historic houses this could be paramount, although there is public data available that could be used, their beliefs, concepts and intuition can largely determine any attempts to solve problems or undertake activities.

Hatsopoulos and Hatsopoulos say that “a fine tuned intuition is based on the accumulation of many associations between attempted decisions and solutions to business situations, and their positive or negative consequences” (Hatsopoulos and Hatsopoulus 1999, 150-1).

Intuition or an individual’s ability to make a decision based on previous situations and experiences is important. In the heritage sector owners, and managers of properties, may not refer to traditional sources, or even have them at their disposal, so intuition can form an important part of their decision making process.

2.7.5 Communication

Meadows states that “communicating information is essentially a social activity” (Meadows 2001, p.71-82). The historic house community is a distinctly different community that has its own patterns of socialisation and communication, which require investigation but which are not within the remit of this investigation. However, it is important that the social aspect of historic houses is not ignored as this is a key aspect
of the community and how knowledge is shared and communicated. Meadows go on further to discuss how the word communication has a myriad of definitions, but can be “the transmission of information from one person or group to another” (Meadows 2001, p.71-82). Therefore the information transmitted can encompass a wide variety of information ranging from emotional re-enactments of historical occasions passed on from one generation to another or the relationship that historic properties have with their local community and surrounding areas, whether this be related to tourism or to other aspects of community life.

Meadows also says that humans belong to many groups, which is a characteristic of the historic house community. Numerous organisations exist within the community, including the Historic Houses Association and the Treasure Houses of England, but to make use of these groups one must first be aware and awareness of these groups may not be as high as it could be. Groups are crucial as they help individuals test their own ideas and discover those of others, helping form a part of their own knowledge.

Kikoski and Kikoski discussed knowledge, communication and the organisation and make the statement: “face to face communication remains the enduring and vital channel for organizational communication” (Kikoski and Kikoski 2004, p.145-53).

Even in the modern environment with the availability of many electronic means of communication, face to face methods are still seen to be the most important and influential. They go on further to say, when discussing the importance of conversation, that “it is a communication process by which one can access the uniqueness of each individual’s thinking, as well as each individual’s knowledge base and life experience – or tacit knowledge” (Kikoski and Kikoski 2004, p.142-53).

This reveals the link between one to one communication and how this facilitates special groups and organisations, such as those in the heritage sector, and how this leads to tacit knowledge being communicated between individuals that run historic houses and ensuing generations.
Reviewing what we have seen about tacit knowledge and the historic house community it is possible to see the importance that face to face communication and tacit knowledge have for the sector. When there is a need for information within properties to address an issue that has arisen, the method of communication is important. Even with the advent of more modern communication technologies, such as email, the importance of tacit knowledge and face to face communication in social contexts is of considerable importance at historic houses.

2.8 Summary

In reviewing the literature and studies in this chapter it can be concluded that there is little specific work on the information needs of small businesses or historic houses. The general background and situation of the heritage sector provides considerable information on the position in which historic houses find themselves and their current position.

It is clear from the review that, despite the dearth of material, the sector is large and important. The general public perceive the heritage sector as part of the nation’s history and it is a considerable draw for overseas visitors who come to the UK. The importance of the heritage sector to the UK economy cannot be underestimated. The sector is incredibly diverse ranging from the historic houses that this research is investigating, through to other historically-based attractions in other industries.

Their mission of preserving the heritage for the future is important in understanding why and how establishments operate. It is clear that historic houses are different to other sectors and will have different patterns of information seeking.

Reviewing the management of information and the nature of tacit and explicit knowledge will provide background to the investigations that took place across historic
houses in the UK. Reliance on their own resources has been a facet of their history and the thesis will review their own management of information relating to their property.

Small businesses are of a similar size to most properties and can be perceived to share some characteristics due to this similarity. How many facets of their work are similar though? The literature provides the context with which we can place historic houses as compared to other modern businesses.

There are no studies on historic houses related to information use but the related work on other influences and areas of knowledge will give considerable support to the work discussed in the following chapters.

Reviewing tacit knowledge, the small business sector, tourism, leisure, and museums provides the background for the discovery of the landscape that historic houses exist. The discoveries within the literature create a knowledge base for the thesis that can be utilised to inform the discourse on the information use and needs of those managing historic houses.

The nature of the sector suggests that influences on those at properties will vary depending on the ownership of the property. Privately owned establishments and those maintained by English Heritage or the National Trust have different operational objectives and consequently each has a different ethos. This will determine both their needs and their consequent methods required to satisfy those needs.
Chapter 3

Research Methodology

3.1 Introduction

According to Case, methodology is concerned with the principles, logic and evidence that is best suited to advancing the knowledge within the area of study (Case 2002). This chapter reviews the research methodology that has been developed for this study.

The theoretical model developed for the work is discussed and the methods of data collection used for the study are described and debated to provide an overview of the research in hand.

3.2 The research model

Models are used to represent aspects of real world situations in a systematic manner. Wilson states:

“A model may be described as a framework for thinking about a problem and may evolve into a statement of the relationships among theoretical propositions. Most models in the field of information behaviour are of the former variety: they are statements, often in the form of diagrams that attempt to describe an information seeking activity, the causes and consequences of that activity, or the relationships among stages in information seeking behaviour” (Wilson 1999. p.250).

Models also help to break down the activities, or the system, used by the individuals concerned in this research so as to enable the discussion and analysis of their needs and problems. For this study a number of models have been reviewed to determine their
usefulness as a means of providing a framework for discussion for the information needs of historic houses.

Wilson’s model of 1981 diagrammatically represents an information user with a need (Wilson 1981, p.3-15). The need may depend on previously levels of satisfaction with information acquired previously. This need then leads to a sequence of activities that make demands on information systems and sources. This leads to either success or failure for the user and the use of the information. Importantly the model also refers to information transfer and exchange of information with other individuals. This is not explicitly noted in other models and is an important facet of the information needs of historic houses and necessary for inclusion in some format for a model of behaviour in the historic house sector.

The model was further updated by Wilson to take into account theories that can be used to explain explicitly aspects of individual information seeking behaviour (Wilson 1999, p.257), for example by the use of stress/coping theory from psychological literature to explain what motivates or activates the search for information. It introduces intervening variables that could be role related or source characteristics. Again these are important in the heritage sector as it is these that are most likely to determine the seeking of information.

This recognises different patterns of search behaviour and will have some importance for historic houses and others simply from the view of passively receiving information rather than actively undertaking the search for information.

Models rely on the fact that the user realises that they have a problem. Wilson reformulated Kulthau’s stage process model of the information search process adding uncertainty to the beginning of the process. This expanded upon Kulthau’s stages of:

1. initiation
2. selection/exploration
Wilson’s introduction of uncertainty is key to the area of study as the initial need for any information seeking behaviour is created from the initial position of a gap in someone’s knowledge, such that they need to seek an answer. Historic houses are both givers of information and seekers when they have a problem to solve. This needs to be taken into account in any given model for information needs and historic houses. It is important to bear in mind that managers of establishments may not know or appreciate the differences between these two activities and are likely to respond to a query about information provision as being related to the information they provide for visitors, not related to the information they might require to solve a problem for themselves.

One of the aspects of the research focuses on the difficulties that might be expressed by historic houses in obtaining access to the information that they need. This might arise, if expressed by users, at the extraction stage of Ellis’ model. Ellis proposed a number of stages for the process as denoted below:

1. Starting
2. Chaining
3. Browsing
4. Differentiating
5. Monitoring
6. extracting
7. verifying

The research anticipates that most establishments are unaware and oblivious to many of these stages due to the way that they access information or adapt to their unusual situation. A model relevant to information needs of establishments will not need to
feature of these stages. The level of uncertainty may also be removed and/or reduced considerably depending on the methods used within establishments to support their activities. Importantly Ellis states:

“the detailed interrelation or interaction of the features in any individual information seeking pattern will depend on the unique circumstances of the information seeking activities of the person concerned at that particular point in time” (Ellis 1989, p.171-212).

This gives Ellis’ research more impact in relation to historic houses as the model has been proposed with the view point that any given situation is unique, irrespective of the sector that the information seeking activity takes place in.

Another model that might be usefully used to map the heritage sector owners and managers is that proposed by Leckie (1996, p.161-193). This was devised for professionals and provides a useful model that can approximate to managers and owners. Although not all aspects of the model may be appropriate for historic houses, it can be usefully adapted, taking into account the models reviewed above to provide a model that could describe historic house information needs. Some aspects such as questions of status and pay within the organisation do not equate or have bearing on the tasks individuals are required to undertake at historic houses due to the nature of ownership.

Consequently figure 3.0 shows the model derived from the literature that might best fit activities undertaken at historic houses. A number of stages are represented within the model:

1. The individual in context
2. Tasks
3. Gaps in knowledge
4. Trusted source
5. Personal and external sources
6. Outcomes
7. Reaffirmation of source
8. Task remains.

At the first stage the manager or owner is working within their own specific context at their establishment, which will relate to their surrounding environment, including their organisational affiliations and social standing within the locality. Even though, as noted in 2.5, there are organisations available to offer support, as in small businesses the owner-manager may have the majority of information stored within their own head making most of the knowledge at the property largely tacit (See: 2.6) The surroundings and experience of the individual responsible for the property will substantially affect their approach to their information needs.

The following stage reflects the fact that the needs of the individual might normally be related to the task in hand. This echoes the model proposed by Leckie as professionals will normally have a task related problem. Notably there could be differences between the related tasks expected by Leckie and those that would occur at historic houses. Historic Houses have numerous activities, as noted in 2.4 in Garrod and Fyall’s typology and the subsequent discussion, which will require different approaches. The climate in which properties work where they might be balancing the costs of access versus conservation in the same section notes the difficulties of balancing maintenance costs and therefore activities may be more reactive at properties when problems arise rather than planned and designed with forethought.

Those responsible for historic houses are often the repository for much of the information regarding the property, especially if they are the owner, having had their knowledge expanded through experience and social interaction as noted in 2.7.2. Gaps in knowledge represents the stage at which the individual at a property discovers that they do not have the requisite knowledge to take care of the problem for themselves and consequently this event reveals the fact that they then have an information need.
For the fourth stage of the model a “Trusted source” has been introduced. This reflects the need for a preferred source, as noted in the research of Krikelas, which the individual is comfortable with and seeks when they require information and have a task that requires completing (Krikelas 1983, p.5-20). Certainly in the historic house sector as noted in 2.7.5 they have their own patterns of communication and socialisation which is important with regard to how knowledge is shared and communicated and is also based on the tacit knowledge of the individuals experiences as noted by Wagner-Dobler in 2.7.2.

The fifth stage of the model juxtaposes two elements that an owner or manager may refer to in the search for a solution to their task, or as may more often be the case, a problem needing to be resolved. The two elements are regarding the trusted source that they turn, which can be either personal where it is already known to the individual and is readily contacted directly for information. Meadows notes that communication takes place from one person or group to another (See: 2.7.5) and this reflects these sources. An accountant, neighbour or colleague may be a personal source which would be dependent on the individuals own background or context, while the external element can be another known source or group that is trusted by reputation, such as the Historic Houses Association or a noted expert in the field of the task in question.

The outcomes stage is introduced in this model, rather than using the success or failure as suggested by Wilson’s model, and is preferred for this research as a question mark must exist as to whether there has been a failure in information seeking or if there are levels of success that could be achieved. This last point must also note that an owner or manager may accept a lower level of success, especially as they may not be aware of what information could be available to them if they only stick to particular routes for the acquisition of information. This is reflected in the subsequent arrow which is the “reaffirmation of source”. If the trusted source achieves the desired result or is reasonably close to the desired result then this reaffirms the individual’s faith in the source, whether or not a better source may be available. The other arrow reflects a
failure in the process of consulting their source, where the task still remains if the information is not provided. The task may still remain to be completed, it may be forgotten or a new altered task remains if partial information is provided by the source. The process then begins again until the desired result is achieved.

Figure 3.0: Model of information needs of historic houses
This model has been developed for historic houses as they are not perceived as organisations in the same way that a business might be, the owner can be running the establishment with little support, consequently it is a model for the individual, taking precedence over organisational models. A business, although not necessarily motivated by money, but by a need for independence as noted by Stanworth and Gray in 2.6, is different to the need to pass on the property for future generations (See: 2.4.1). The most important comment to make on the model that has been devised is that it reflects the sector. The organisation in the sector and the tacit knowledge of property owner/managers is reflected in the simplistic model in figure 3.0. Owners and managers are rarely consciously of running the establishment as a business and do not see information management as a priority (See: 2.5). Usually it is a part of their everyday activity in preserving their lifestyle and/or the past. Consequently their decisions are made based on their own background and surroundings, despite the wealth of organisations that can help them (See: 2.5). They follow what might be a pre-ordained pattern that other generations may have taken before, without necessarily thinking about what they are doing. Consequently their route to solving their information needs will follow similar straightforward paths as described in the model.

For this model the following questions can be asked:

1. What are their information needs?
2. How the information needs of historic houses are being met?
3. Whether there are any large gaps in their provision?
4. Can the nature and flow of information be improved?
3.3 Methodology

At the beginning of the research different methodologies were investigated to determine whether these would be quantitative or qualitative, or whether both should be employed. Sutton states that:

“The researcher who forgoes context-crossing data-collection techniques such as surveys and chooses instead to undertake an intensive study of a single setting […] supports the particularist view that every case is unique, making generalization and comparative theories that much more difficult to achieve” (Sutton 1993, p.411-430).

As a relatively new area of study focussing on a particular “instance” would provide a view but only of that particular property, consequently depriving the world of a view on the sector and of the different varieties of house ownership and activity base that exists. The research seeks to determine a view of the sector across the United Kingdom so that conclusions can be drawn upon the nature of the sector. Layder states:

“A number of researchers have used qualitative and quantitative analysis in conjunction with each other, usually in the form of fixed-choice questionnaires which include some open-ended questions or which are followed up with some in-depth interviews” (Layder 1993, p.110).

Other researchers have followed similar paths when carrying out their research and combining the two, both quantitative and qualitative, enables the research to get a view of the sector, and to elaborate on that initial data.

As the research is a new area of study part of the remit must be to determine theory as well as to ascertain if existing theory can provide an explanation of any observed behaviour in the sector. Layder is quoted as saying: “Middle-range theory is associated
more with theory testing research while grounded theory is generally linked with theory-building research” (Layder 1993, p.19).

As a new area of study this work is based in the grounded theory approach to research. It should not be ignored that in looking at models expressed in previous information needs research we are looking at an approach that does straddle both. New theories and conclusions can emerge from the study of the new area but additionally we can determine whether there is some application to existing models.

Middle range theory is more often associated with quantitative methods of data collection, while theory building is usually allied with quantitative techniques. However Glaser notes:

“Grounded theory method although uniquely suited to fieldwork and qualitative data, can be easily used as a general method of analysis with any form of data collection: survey, experiment, case study. Further it can combine and integrate them” (Glaser 1978, p.6).

This provides a basis on which we can use both quantitative and qualitative methods as part of the collection of evidence. Layder also believes that using a multi-strategy for the collection of data to “tackle the question of macro-micro linkages” (Layder 1993, p.118).

What Layder refers to is the ability to be able to view the “macro” picture of the historic house sector and then compare this to the “micro” picture of individuals to see what bearing they have upon each other, enabling conclusions, recommendations and even theories to be expounded.

The use of quantitative data techniques must be applied to this study as it will enable the research to draw some conclusions upon the nature of the area of study. For example we can determine whether National Trust properties have problems in
accessing and using information in the same way as privately owned properties do, or whether they all have similar problems and ways in which they use information. Quantitative techniques enable the researcher to “get clear-cut, precise, accurate results that factually reflect the situation under study” (Slater 1990, p.109). This should lead to a “lucid, and apparently or hopefully objective description of the study” (Slater 1990, p.110).

These methods are appropriate to areas where study has been undertaken and something is known about the community. For heritage however each is little research and little or none is known about the use of information and the needs of those looking after properties. Consequently adopting qualitative techniques can add a further dimension to the topic of the study. As Slater tells us, “qualitative research will give a richer answer, more informative material and more insight” (Slater 1990, p.110).

The area of research is reviewing the information needs of historic houses and although there is existing research on information needs, historic houses are a new area. Information needs literature and the existing literature on historic houses can be used to determine some directions and questions for the research. Consequently during the literature review it was possible to deduce or adopt some “hunches”, described in the introductory chapter, that suggest practice within historic houses. Consequently a mixed methodology, following both quantitative and qualitative techniques, has been followed to ensure the viability of the research.

3.3.1 Research Methods

Hernon stated that in the study of library and information science there were different types of research for which different designs and methods are appropriate (Hernon 1991, p.6). The approaches he suggested are briefly considered and are reviewed below and include survey research, field research, historical research and observation.
3.3.1.1 Field Research

Field research operates in a natural setting and has to be conducted by the researcher. The size of the population negates this as an initial approach. The population of historic houses in the UK is approximately 1500. Even if possible to carry this out it would take too long. However, Gorman and Clayton state:

“Fieldwork is the interface between researcher and data in the case study approach characteristic of qualitative research: it involves collecting data ‘in the field’, being out among the subjects of one’s research, becoming immersed in their milieu and seeing events and activities as they see them” (Gorman and Clayton 1997, p.44).

The extent to which one can be immersed in the work of historic houses is limited, however the research does make use of this type of research to give some context for the interviewer and to give some understanding to the subject’s interpretation of normality. This method could not be used for the whole of the research as it is time consuming and is an inefficient way of gathering data on the scale required for this study. Surveying is quicker and more reliable. However this enables the researcher to gain a view into the subject’s world and to follow up on findings from other methods of research used.

3.3.1.2 Observation

Although it could be an appropriate technique to use to determine information use by properties it must first be considered whether it can provide any more than other simpler methods. Could the same information be gleaned from a one to one interview, rather than watching an individual in-situ undertaking their day to day activities? In some cases this may be appropriate, however in others, especially privately owned homes, where doing the laundry and washing dishes is a part of activities, does not lend
itself to observation that would help support this study. Determining patterns in this setting would be difficult and would inevitably lead to confusion regarding the search for information. Additionally it would take too long and would be a difficult task to complete to cover different types of properties. Another problem is also implicit in observation, the presence of the researcher. Gorman and Clayton state:

“The bias that occurs when a researcher is introduced into an otherwise ‘natural’ environment must not be overlooked. Few people can ignore a stranger sitting in a corner, both watching and taking notes” (Gorman and Clayton 1997, p.24-37).

In a setting that could be a ‘family home’ this would be entirely inappropriate and would undoubtedly affect the behaviour of the participants. Consequently using interviews would be more appropriate and less intrusive for those at historic houses.

3.3.1.3 Historical Research

Historical research is not confined to the study of history. Tosh states:

“history is a hybrid discipline valuable both for its own sake in its contemplation of the past and for its practical social role”(Tosh 1991, p.29).

It clearly has a role to play in this research. The background to the study of historic houses is historic and the study of their needs cannot take place without a view of the sector and its history. The present is a direct product of the past and cannot be understood without reviewing the historical background which has resulted in the present situation. Historical research involves the study of events and incidents that are indisputable such as documents, memoirs, buildings and other products.

In most areas of research a historical preface is necessary to gain the benefit from existing knowledge. Normally historical research is usually used to determine the
history of an individual or organisation and helps with the evolution of particular theories.

Historical research does have a bearing on this research. Reviewing the literature on the development of the sector and those documents produced by from within the sector, a context can be given to the data that has been collected as part of the research. Collecting, verifying and organising data on the historic background to historic houses provides the background to the development and importance of historic houses in the United Kingdom.

3.3.1.4 Survey Research

“Survey research is characterised by the selection of random samples from large and small populations to obtain empirical knowledge of a contemporary nature” (Busha and Harter 1980, p.53-56).

Using survey research enables the researcher to gain knowledge about characteristics, opinions, beliefs, and so on, regarding the population under consideration. It would be difficult to survey an entire population that is spread across the length and breadth of the United Kingdom, whether by questionnaire, interview or telephone interview. Surveys usually collect data that is used in quantitative ways that can be added together to gain a view of the sector and the properties concerned. The principal advantage of using surveys, is to obtain a detailed description of the population in question. This is because it will enable the selection of a sample of the population to gain empirical knowledge. This will enable generalisations on the nature of the information needs and uses of historic houses to be studied without having to undertake a survey of the whole population.

However, surveys can, and often do, contain an element of qualitative methods by including open ended questions or ‘other’ sections that need to be completed. This
provides macro-micro linkages for the research and helps to “flesh out” the data collected on the sector by any surveys carried out.

A survey is usually a cross-sectional study and should come from a properly selected sampling base. It is the primary base for data collection in this area, and should involve a defined purpose, problem and objective (Adams and Schvaneveldt, 1985). Surveys can therefore be used for both descriptive and explanatory needs within the research to a degree. However surveys are generally weak in explanatory research so it is necessary to use other methods to supplement that of the survey. This is in keeping with the suggestion that:

“investigators are generally wary of placing too much faith in any one instrument or other technique; they tend to rely upon multiple data-gathering methods” (Busha and Harter 1980, p.53-56).

Using multiple techniques gives the research strengths in different areas that will be used to support the conclusions.

### 3.4 Data collection methods

The methods selected for the collection of data are multiple. Initially historical research has been used to determine the extent of the historic house sector and to determine the direction of the additional aspects and requirements of the methods. The historical research is reported in section 2 of the research, the literature review. Tuchman says that:

“adequate social science includes a theoretical use of historical information. Any social phenomenon must be understood in its historical context” (Tuchman 1994, p.306-323).
By reviewing the documentation available on the sector and documents used within the sector it was possible to take a view on the research questions and hypotheses to inform the survey research.

A survey research method can be defined as a “systematic collection of data concerning libraries and their services, activities, staff, operations, use and users” (Busha and Harter 1980, p.53-56). Busha and Harter identified that surveys were one of the most appropriate methods for making an examination of information organisation related systems. Although not reviewing libraries per se the research is endeavouring to identify those information related characteristics in the historic house that would enable conclusions to be drawn. Adams notes that the most popular methods of data collection in survey research are questionnaires and surveys(Adams 1985). Webb et al noted that there was an over dependence in social research upon the use of a single method based on questionnaires and surveys (Webb et al 1977). However, they also noted that they were the most useful and flexible devices for gathering information. Indeed, Kidston notes that difficult areas of study such as service usage and information needs the questionnaire is a very common method for data collection (Kidston 1985). Survey research is employed in the first phase to enable the population of historic houses to be adequately covered. After a review of the historic background to the sector, a questionnaire is employed to gather data, creating a picture of the existing landscape and providing a broad generalisable set of findings to be presented.

In order to gain further, more detailed information, both qualitative and quantitative methods have been utilised. Patton says that qualitative methods normally produce a wealth of detailed information about a small cohort of people, or cases and situations studied (Patton 1990). Consequently the questionnaire survey was followed by additional interviews with individuals based at historic houses. Further data has been collected by on-site interviews at historic houses. Both methods are being utilised in examining the information needs of historic houses, as they are adaptable for seeking answers to the research questions and will measure the reactions of a wide number of
people in the first instance and then drill down to determine whether there is specific reasoning behind the emerging trends.

3.5 The Questionnaire

The decision to use a questionnaire was made to give respondents the choice of anonymity that might have led to information being provided to the researcher that may not otherwise be given. Some establishments are operationally independent of their member organisations, but others have to follow guidelines that are laid down. It is difficult to argue that an interview is truly anonymous and even if the researcher makes a pledge to this effect when conducting face-to-face interviews the interviewee may still feel that it is not truly anonymous. In the final analysis the number of questionnaires returned that did not have any indication of their provenance was very small. Only one or two were received where the establishment had not entered their property name on the survey. Equally the questionnaire enabled us to cover a wide geographical area within a reasonable time scale. Using a questionnaire has some outstanding benefits for this research. Some establishments are operationally independent of their parent or member organisations, but others have to follow guidelines that have been set. The anonymity of the questionnaire is therefore a useful attribute. More importantly the research benefits from being able to collect a large amount of data in a short amount of time. For a single researcher this is paramount. It would be impossible to interview a large number of establishments. Another benefit of using questionnaires is that they can cover a wide geographical distribution. Historic houses can be found in all parts of the United Kingdom, so this is important. They can also be relatively easy to prepare and distribute.

There are drawbacks to using them though. On the whole response rates can be poor and it is difficult to ensure that the correct person completes the questionnaire and it is not possible to follow up questions. However low response rates can be overcome through the use of follow up techniques.
As the research is reviewing a population that is too large to be fully surveyed on a part-time basis it was decided to use a cross-sectional design. Using this approach enables a ‘cross-section’ or sample of the population to be targeted. To be valid this must all occur at a single point in time.

3.5.1 Questionnaire development

The questionnaire was initially developed after the literature was reviewed. A view on the work of, and background to, historic houses emerged at this stage that informed the continuing development of the questionnaire. This was despite the dearth of literature on information needs and historic houses.

The questionnaire was designed to reflect the research questions as identified in the aims and objectives noted earlier in section 3.2. When drafting the questionnaire it was imperative that the questions were kept to a manageable number, while still addressing the issues. To achieve the best possible response, close attention was paid to ensure that it was unambiguous and as easy as possible for respondents to complete. The same questionnaire was used for all historic houses to make it possible to determine whether there were any dissimilarities between privately owned properties and those managed by larger organisations such as English Heritage. The questionnaire also left room for qualitative comments from property managers. This allows linkages between the macro-micro linkages noted in section 3.3.

Additionally the questionnaire was reviewed by the Library and Information Statistics Unit (LISU) to ensure that the content was clear and unambiguous and not overlong.

3.6 Pilot study

An initial pilot phase is necessary to ensure that the questions used are appropriate to retrieve pertinent data that will enable the analysis of information needs at historic houses.
A questionnaire, which appears to be clear and unambiguous to its designer, may not appear that way to the target population. In order to ensure that this problem was overcome a pilot study was undertaken. The timing of this was carefully considered, as many properties close down during the winter months, to both protect the property from the undue influence of visitors trailing dirt through the property and allow remedial works to occur. The questionnaire was initially designed and piloted in October – November 2001.

Heritage organisations, such as the National Trust and the Historic Houses Association were contacted to request details of pilot sites that might act as pilots and advise on the quality of the questionnaire. Once contacted however the national organisations referred the researcher to the regional offices (where they existed), indicating that it was not possible to send out a questionnaire nationally. This suggested that historic houses operate autonomously to a degree from the parent body. Additionally the regional offices referred the researcher to the individual properties indicating that establishments had considerable autonomy to run their own affairs. The National Trust, English Heritage and the Historic Houses Association do provide help and support for historic houses; however properties do have the power to make their own decisions and act upon them.

This was a disadvantage to the research as it was hoped that it would be possible to use the organisations to act as a conduit for the dissemination of questionnaire surveys to give the survey a level of legitimacy that would keep the response rate as high as possible. However due to the response from the heritage organisations and the manner of operational activity at properties it was necessary to contact each possible respondent individually.

Six establishments were identified from heritage membership handbooks, including the National Trust, English Heritage and the Historic Houses Association, to ensure that if there were any considerable differences between properties and their ownership then
they could emerge. All were contacted by phone and all agreed to act as pilot sites. Questionnaires were sent out and requested to be returned within three weeks. Five were returned within the stated time period.

Receipt of the pilot questionnaires indicated that it was necessary to make some modifications. As a result of the pilot questionnaire survey, modifications were made to the questionnaire during December 2001 (Appendix I), before it was sent to a sample of historic houses in the United Kingdom.

3.7 Determining the research sample

There are a wide variety of historic houses across the country that provide different facilities and belong to different heritage organisations. To find out their information needs, it was necessary to select a large sample to be surveyed to gain quantitative data from which the hypotheses can be tested.

Although it is not clear how many “historic houses” actually exist in the United Kingdom, the richness of the country’s built heritage provides a large number of properties that could be included. Trying to obtain a definitive, or as near as possible, list that would provide a suitable representative sample from the sector required investigation.

As a result of the literature search, publications were identified that could be utilised as lists from which the sample population could be drawn. The National Trust, English Heritage and the Historic Houses Association maintain their own lists of properties for those wishing to visit them. The most comprehensive listing of historic houses and castles open to the public is *Historic Houses and Gardens* (Hudson 2002). The publication is produced on an annual basis and provides coverage of a large number of heritage organisations including the National Trust, English Heritage, the Landmark Trust and the Historic Houses Association, as well as details of properties run by private owners and preservation trusts.
Hudson’s also has a number of other features that facilitated the enhancement of the survey. Listings within the publication are stratified into regions. It enabled the researcher to obtain proportional representation of properties across the regions of the United Kingdom. Additionally, within its listing it is also divided further which offers additional advantages for the research. Within each regional band the properties are grouped into counties providing further stratification down to county level. This made it possible for the research to achieve proportional representation at county level, providing enough responses are received from the participants. Additionally, Hudson’s list within the county sections, what are considered to be, major attractions first. This would include properties that have large visitor numbers and/or offer more facilities, including Osborne House on the Isle of Wight or Longleat in Wiltshire. Thereafter Hudson’s listing presents properties in strict alphabetical order.

It should be noted that it was not intended to include gardens as part of this research, except where they form part of, or are an attraction at, a historic house. There are numerous historic gardens that are open to the public, which are not attached to properties and are run independently by private owners or the National Trust attracting large numbers of visitors annually. However, these have been excluded from the sample as they have a limited range of activities compared to historic houses that include gardens as a subset of their activities. Consequently these were removed from the Hudson’s listing before the sample was chosen.

Also included in Hudson’s are churches and religious establishments that are of historical importance. These were also removed from the listing as they operate in a different manner from historic houses under consideration for this research. Ecclesiastical establishments are not run by heritage organisations or private owners and have limited access to funds for conservation and preservation. Their activities are also limited to a few and also to, in most cases, a single building. Consequently these limitations and the nature of their ownership led to the researcher concluding that their
specialist nature requires a special investigation and outside of the remit of this research.

Every second historic house in Hudson’s listing was selected which would have provided a sample of 50% of the total population. This produced a research sample and total of 548 properties to be surveyed.

### 3.8 Distribution and return

The survey (Appendix I) was sent to the property manager or those undertaking similar roles as identified in *Historic Houses and Gardens*, including custodians, administrators and in many cases the owners. This was determined by the need to ensure that an overview of the property’s functions would be achieved and the manager will normally be involved in all aspects of the running of the property. A covering letter was attached to each survey explaining the research and its benefits for the sector encouraging them to return them rather than ignore or forget about them. Each survey was supplied with a business reply envelope so that the recipients could return them without incurring any costs for themselves. As a further prompt the survey was printed on yellow paper so that it did not get mislaid on the desk of those individuals at historic houses which the research was targeting.

All 548 questionnaires were sent to the managers, or their equivalent, of every second property within Hudson’s listing. To further boost the number of returns a follow-up email was sent to all properties in the sample that had not yet replied. This elicited a further number of responses. Additionally some properties received a follow up phone call as they had indicated that the survey was not directed at them. After a discussion with the researcher some more responses were also returned.

This resulted in 201 responses being returned to the researcher. This is a total return of 36.7% of the questionnaire survey distributed. The distribution of returns from each of the regions is illustrated in table 3.1 and it can be seen that some of the United
Kingdom regions have a higher proportion of historic houses than in other regions. The highest concentration of properties is to be found in the South East of England. The table also shows the number of surveys distributed to establishments compared against the actual number of returns. Comparing the survey returns with the original distribution to properties indicates that the returns for each region can be argued to be a representative sample. This is important as a representative sample gives some validity to conclusions that may be drawn with respect to regional variation or similarity.

<table>
<thead>
<tr>
<th>Region</th>
<th>Distributed</th>
<th>Returns</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
</tr>
<tr>
<td>London</td>
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</tr>
<tr>
<td>South East</td>
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<td>Eastern</td>
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<tr>
<td>West Midlands</td>
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<td>7.9</td>
</tr>
<tr>
<td>Yorkshire and the Humber</td>
<td>32</td>
<td>5.9</td>
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</tr>
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<td>Scotland</td>
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</tr>
<tr>
<td>Wales</td>
<td>31</td>
<td>5.7</td>
</tr>
<tr>
<td>Northern Ireland and Eire</td>
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<td>4.0</td>
</tr>
<tr>
<td>Missing data</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>545</td>
<td>100.0</td>
</tr>
</tbody>
</table>

*Table 3.1 Regional distribution and return of questionnaires*

The respective regions returned between 30% and 50% of the questionnaire survey. Any conclusions drawn from the data which comment on regional variations can be argued to be representative, as the returns are evenly spread across the United Kingdom. A number of regions generated slightly lower returns, including the South East, South West and Wales, all with less than 30%. There is no evidence to indicate
why there was less than 30% returned for the South East and South West. In Wales, however, anecdotal evidence suggests that many castles are ruins, and as such are often unmanned or managed from a central unit. One respondent in Wales indicated that they had responsibility for a number of sites and had consequently received more than one survey. This could have affected the number of returns, as respondents are unlikely to complete a survey for each site in their care.

3.9 Interviews

The results garnered from the questionnaire survey were used as the basis for the development of questions for interviews of historic houses that followed. The collection of data by questionnaire also helped to identify a subset of users that could be interviewed to see whether their “situation” provided any further data that might indicate why they operated in a typical way or whether there were other factors that had a bearing on their activities and methods of use. Consequently a number of factors gleaned from the questionnaire surveys were used to determine participants from which in-depth information of a qualitative nature could be gathered to both confirm the data collected by survey and also to discover possible causes and needs regarding information at historic houses. The final question posed in the questionnaire survey was a request to the participants asking if they would be prepared to act as interview candidates for the later stage of the research. Although only a few completed this section, it did provide a starting point for the researcher from whence a subset of candidates could be found.

Gorman and Clayton indicate that interviews have the benefits of:

1. immediacy
2. mutual exploration
3. investigation of causation
4. personal contact
5. speed (Gorman and Clayton 1997, p.66).
Interviews have important benefits for the research. Unlike questionnaires they can be carried out personally or by telephone. This gives a number of advantages.

Questions put to interviewees can be followed up on and the interviewer can also expand on their own explanations providing investigation of causation of any particular comment or an exploration by either party regarding a topic of discussion. The returns, unlike questionnaires are usually high, as the researcher makes personal contact with the subject to allow the process to take place and can also make some assessment of the subject’s personal qualities. The interviews for this research have been carried out in person as this had the additional effect of putting the interviewee at ease and allowing the interviewer to view the interviewee’s environment and how this might impact on the responses and how it related to information gathered to date. Performing the interviews personally also enables the interviewer to adapt immediately to any query. The issue of speed noted by Gorman and Clayton is relative as although interviews take place at a particular moment in time they must still be transcribed or written up afterwards to record the event.

Gorman and Clayton also indicate that interviews have the potential drawbacks of being:

1. costly
2. uncritical
3. too personal
4. especially open to bias (Gorman and Clayton 1997, p.24-37).

Intervewing is more costly due to travel and time commitments and has the potential for bias from the interviewer. It is important to note that bias of some nature can appear in any research work. The interviews followed a questionnaire survey where data had already been determined, so were largely checking and following up on trends, which has helped to reduce possible bias.
Using telephone interviews can enable interviews to be carried out more quickly, but the telephone can be too impersonal for some people and they may not be comfortable answering questions in this manner. It also does not afford the interviewer the chance to monitor the subject’s reactions to questions and their working environment. Face to face interviews have been used as it was felt that the rapport that the researcher had developed with subjects was sufficient to put them at ease and elicit free and frank responses.

“Verbal data, by virtue of its quantity and varying degrees of structure, are particularly susceptible to errors in interpretation” (Brenner, Brown and Canter 1985, p.4).

Brenner, Brown and Canter note the difficulty in collecting data by interviews in that the researcher’s perception of what they see and hear is all important. They must therefore ensure that they check with the subject that their understanding is correct and agreed upon by the subject.

3.10 Historic House Interviews

Using a small number of properties as case studies will permit the collection of further qualitative data. The results of the questionnaire survey have provided details of properties that are willing to act as interviewees in the latter stages of the research. The case studies include the:

1. Selection of appropriate properties
2. On-site interviewing of property owners/managers.

Properties were selected on the basis of ensuring wide coverage of the United Kingdom and to endeavour to include the various different aspects of the properties including:
1. Ownership
2. Location
3. Size
4. Regional variation.

Consequently the properties chosen were:

1. located in England, Scotland and Wales to ensure regional variation
2. were located in both urban and rural settings
3. ranged from establishments with large visitor numbers in the order of 500,000 to those with only hundreds of visitors annually
4. owned by a variety of individuals and organisations including the National Trust, English Heritage and private individuals.

To maintain the anonymity of the individuals as far as possible the interviewees have been anonymised and their situation as detailed above is presented in appendix II. The interviews took place during the period 2004-2005, many of which were difficult to arrange due to the issues noted above with the survey response in section 3.8, but appropriate contacts were made and interviews took place in the setting of each historic house focusing on the following aspects:

1. The individual and their situation
2. How they use information and what for
3. Plans and policies in place directing the work of the property
4. How information at the property is kept and accessed
5. Whether there were any barriers to the use of information
6. Whether there were plan to develop the use of information.

The interview method chosen was that of semi-structured interviews allowing the researcher to be familiar with where the interview was headed without reference to the
questions at all times. Using semi-structured interviews also permitted the researcher to follow up on any comments made by the interviewee to either clarify or elicit further information for the study. Prompt cards were developed and used by the researcher to enable examples to be presented to the interviewee if they were having difficulty understanding some of the concepts being presented to them (See appendix III).

3.11 Data analysis

After the data was recorded it was then encoded and transferred to data files stored on computer. These files enable analysis in both Microsoft Excel and SPSS (Statistical Package for the Social Sciences). It has been stored in both formats to ensure that the best aspects of each software package can be utilised.

SPSS has been chosen as it enables the easy management of statistical procedures. Thus the data can be processed by frequency, percentages, correlation and other measures. Excel is also being used as it has better graphical presentation features, which have been used to improve the presentation of the research findings.

Analysis of the interview data proceeded in a different manner to enable the emergence of concepts. The results were segmented and categorised, as interviews took place, to enable the data to be divided into issues and themes at the conclusion of the process. From these it is possible to be able to make some interpretation of the data to draw conclusions and make recommendations based on the research hypotheses.

Using this structured approach will enabled the examination of evidence in the light of the project’s aims and objectives and to also deal with any anomalies that occurred. The results of both the questionnaire survey and the interviews are presented in thematically formed around the data gathered in Chapters Four through Nine.
Chapter 4

Similarity of needs comparison: Historic Houses and SMEs

At the outset of the research, one of the intentions was to compare those historic houses which were surveyed and interviewed. The following chapter reviews the similarity of needs of those responsible for the running of properties across historic houses. Various areas are reviewed from the mission of historic houses to the use of information by those who are running properties on a daily basis. In addition comparison is made with SMEs through analysis of the literature, to determine whether there is any correlation between historic houses and small businesses. Where there are similarities these are described, as are the differences, and from these observations comments can be made on the picture that these provide on the historic house sector. Throughout the discussion, the view of the historic house as a sector in its own right that it has its own needs, organisational structures and communication channels for those that are working within it, is maintained.

The heritage sector is a vast and varied field, as has been discussed during the literature review. Prentice’s typology in 2.1.5 provides a breakdown of the heritage sector that is beneficial to this research. His typology defines distinctly different aspects of the heritage sector and portrays vividly both the size of the sector, but also defines stately and ancestral homes as a distinct strand in the heritage sector. However it should be noted that much of the character and individuality of historic houses is not only their architectural excellence but also the cultural context in which the building belongs. Many properties have collections amassed from the ‘Grand Tour’ as discussed in 1.7.4 and provide both cultural and historical context to the property and those families that reside there and which adds “value” beyond that expressed solely by the architectural
excellence of the property. This makes the historic house sector singularly important as it combines aspects of the built heritage, natural heritage (expressed through the surrounding landscape), and artefacts collected by the incumbent owners. This makes them distinctly unique from other heritage attractions as noted by Prentice and the trends suggested by Herbert and Hewison in 2.1.3-4. Historic houses undertake a wide range of activities which are discussed in 2.4 ranging from protecting the historic fabric of the building to recreational facilities for visitors.

Within this distinct sector of stately homes there are a number of distinct organisations that support historic houses’ activities, which were discussed earlier in sections 1.1, 1.7.1, 2.1.3 and 2.2 in relation to the sector. These organisations provide different levels of support depending on their relationship with the properties ranging from support for staff at their sites or help for owners of historic houses.

To determine whether historic houses have similarity of needs we can look at how far those that run the properties view their roles and far those roles are similar to those at other establishments and their requirements for using information in the running of the property. In addition we can view how similar to small businesses the needs of historic houses are so as to determine if there are any valid methods that can be used to support the work of historic properties from the business sector.

4.1 Managers of historic houses

One of the most important factors to consider is the individuals who are in the position of managing, or in some cases what might be more appropriately termed ‘looking after’, historic houses. The survey questionnaire sent out to properties during the research provided an astonishing array of titles applied to those individuals who are in the position of being responsible for these properties.
The majority of respondents (N=65) to the questionnaire were actually designated as managers of the estate or property. This compared with 34 respondents who were the owners of the property and a further 36 who were dubbed site administrators.

An important factor that should be noted is that many properties are owned either by a trust or family who live in the property and may have done so for generations. As noted earlier the survey revealed 17% of properties were directly managed by the owners.

During two of the interviews the responses given to the question about their role were:

“wife, mother, housewife, once I’ve done the laundry, the cooking and all that, I also look after tenants”³

and

“being a widow I therefore have huge amounts of work to do, more than a normal couple I suppose.”⁴

Some owners are running the property as both the family home and additionally as a piece of the nation’s heritage.

These comments echo the definition of small businesses used by the Bolton Report which stated that:

“Firstly in economic terms, a small firm is one that has a relatively small share of its market. Secondly, an essential characteristic of a small firm is that it is managed by its owners or part-owners in a personalized way, and not through the medium of a formalized management structure. Thirdly, it is also independent in the sense that it does not form part of a larger enterprise and that

⁴ Interviewee B, 7th February 2004.
the owner-managers should be free from outside control in taking their principal decisions” (Department of Trade and Industry 1971, p.1).

The similarities are clear, SMEs and historic houses do have owner managers in place in many establishments and they are free to make their own decisions.

However this is not true of all historic houses, as a number of them are managed by national institutions charged with protecting the nation’s heritage for future generations. English Heritage, the National Trust, CADW and Historic Scotland all have overarching responsibility for many properties, although the majority are privately owned and managed. For some establishments this requires that other individuals, not necessarily family members, may be carrying out their job role on behalf of the owners. This in itself may dictate their job title and role.

While it would be difficult to define precisely the difference between managers and site administrators, and beyond the scope of this research, scrutiny of the literature on historic houses, such as *Historic Houses and Gardens*, (Hudson 2002) indicates that the titles used at historic houses could bear some relationship to the levels of activity at the establishment. Larger properties, that on occasion hold public events and offer a wider range of activities, have managers (N=65) who have responsibility for taking major decisions on behalf of the establishment. A detailed examination and discussion on the activities undertaken at historic houses follows in 5.1. Site administrators (N=36) are more likely to be located in those properties, which undertake a smaller range of activities or are found in more remote and less accessible parts of the country.

The final category used in the survey to describe job titles was that of ‘other’. This provided the opportunity for the various establishments to choose their own preferred term. The full list of alternative titles is displayed in table 4.0. Overall there were 19 other job titles given which accounted for 63 of the responses.
Table 4.0 Responses received from historic houses designating additional job titles under the heading ‘other’.

The single job title most often repeated was that of marketing manager/executive (N=12). This is a clear indication of the importance given to the promotion of establishments. Properties that use this title still undertook standard activities as other establishments also do, such as opening the house and gardens to the public. However
what they also do is to market a series of events during the year that use the house as a ‘backdrop’. In addition many of the properties with marketing managers also offer the house as a venue for hire. This is by no means an accurate guide to the use of the job title. Many other properties carry out similar activities but still use headings such as property or visitor manager. The difference may lie in the fact that these properties, such as Arley Hall, are of considerable size, but do not command the presence of establishments such as Longleat. As a consequence the houses are likely to put additional effort towards competing with their considerable competition, especially when that competition may be an exceptionally entrepreneurial owner, as at Longleat and Chatsworth where the Marquess of Bath and the Duke and Duchess of Devonshire respectively have national profiles.

Terms that were used to describe those responsible at properties included custodians (N=4), curators (N=10) and house/site stewards or managers (N=11). Where one or more properties are owned collectively by a single entity, for example English Heritage and the National Trust similar titles are used at their properties. English Heritage uses the term ‘custodian’ for its employees, while the National Trust prefers the term ‘property manager’. These are different approaches to the management of the heritage environment, and in themselves the job title does indicate a different viewpoint. The term ‘custodian’ does proffer the image of an organisation that views the custodianship of their properties for the nation as paramount. Similarly the other job titles can also indicate the preferences of the owners, whosoever they may be. Some properties do see themselves as museums having ‘museum managers’, as seen in table 4.0. In addition a large number of properties (N=10) prefer the term curator again giving the overwhelming view that they are protecting the property to maintain the fabric and ensure its long term future. In addition those properties preferring the job title are largely owned and managed by local authorities or educational trusts. This indicates that the property is viewed as an historical asset to be used for educational means. These latter job titles also portray the establishments being treated and following the procedures normally associated with museums. On a smaller scale some properties will concentrate on fewer activities, but will be a main provider of that activity in their
locality. The title ‘administration and conference manager’ used by one establishment in the survey indicates that properties do use their facilities for only a few activities to support the upkeep of the fabric. Arbury Hall is one such that concentrates on corporate activities rather than opening to the general public for a longer period during the year.

One interviewee stated:

“My job title is Comptroller, which is a traditional title for stately homes.”

This indicates that the determination of the job title is sometimes governed not by the owners of the property, but by the establishment’s own historical background.

4.2 Mission of historic houses

The operations that make up the elements of the historic houses’ mission are key to helping to determine how similar or dissimilar the needs of historic houses may be. Garrod and Fyall produced a typology of elements belonging to the mission of heritage attractions, which is discussed in section 2.4. Although the subject of the study is heritage attractions and consequently broader than the sector this research is focusing on it provides a measure against which historic houses can be compared.

The literature on the needs of small and medium sized businesses (SMEs) is limited, but the existing research noted in 2.6 enables comparisons to be drawn between historic houses and other SMEs. The broad areas of activity that require information, noted in the Bolton Report in 2.6, can be compared to the typology we have already seen for heritage attractions. There are similarities, yet there are also some clear differences between them. Direct correlation can be seen between the financial aspects of SMEs and heritage attractions. The correlation with the financial aspects is clearer than some of the other aspects in the lists. The survey carried out at historic houses for this

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research returned 118 for those respondents who were involved in budgeting as a part of their role. Commonality exists across all three sets of research in this area.

The graph in figure 4.1 depicts those aspects of work that individuals responsible for properties perform on a daily basis as described by those respondents in the questionnaire survey sent out to review the information needs of properties. The graph indicates that the major roles undertaken by property managers are customer relations (N=156), marketing (N=139) and staffing (N=137). These are similar to the aspects described in the Bolton Report, where marketing is a clear need also for SMEs.

However interviewing at historic houses indicated that the marketing of it knowledge properties in the historic environment may take forms not usually employed by SMEs. For example one owner stated: “Although we have to be open we don’t want huge numbers of people. We market within what we’ve agreed.”

This is not uncommon in establishments that restrict access to the property to maintain a balance between access and preservation as was discussed in the literature review. At another property the interviewee stated that:

“he (the owner) demands that we have a free car park open 365 days of the year giving open access to the park. It costs us £80,000 to maintain the car park […] it’s a brilliant piece of PR.”

This gives a picture of how unusual some operations are at historic houses in their approach, when compared to traditional SMEs.

It is clear that the results of the survey and interviews provide a different view of those activities that are more relevant to historic houses from the results from the study carried out by Garrod and Fyall (Garrod and Fyall 2000). Their study places ‘relevance’

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7 Interviewee C, 6th January 2004.
much further down the listing of priorities, whereas making the property available to as wide an audience as possible is much more important to historic houses. It is probable that this difference comes about due to the nature of some historic properties. They need to convince members of the public to visit the property, but may have to overcome the public’s natural aversion to paying money to owners who may already be perceived as being financially well provided for, even if this is not the case.

![Main areas of manager's work](image)

**Figure 4.1 Main areas of manager’s work**

Beyond these roles there appears to be a second tier of roles that form a part of manager’s job. These are budgeting, education, liaison, maintenance, security and strategic planning with (N=95), (N=113), (N=110), (N=109) and (N=104) respectively.
Those roles carried out least were those that could be described as specialist activities, these being grant aid, insurance and surveying with (N=53), (N=51) and (N=22).

Education is important to historic houses as is seen from the survey results with 48% of respondents electing to select this activity. The interviews with those managing the properties following the questionnaire survey provided the following statement:

“We’re supposed to do what we can to help children, and yes, I sometimes have the local primary school, to do a project.”

This indicates an implicit need to want to educate the next generation and to pass on the heritage of which they are the present guardians. This extends from those properties in private hands to those run by either the National Trust or English Heritage. The custodian at a property run by a heritage organization stated:

“We are for educational purposes….we have got an education room on site”

This gives further emphasis to the different role that historic houses are performing for the nation. The sector is made up of both public and privately owned houses, but the role remains the same. They are presenting a picture of the nation’s heritage to both inform visitors, and to encourage them to come back and investigate their history further. In all cases there are financial necessities attached to this for all of them.

This has equivalence with Garrod and Fyall’s study (Garrod and Fyall 2000) which also places education high on the list of priorities. Education is a key aspect of establishment operations, enabling the drawing in of visitors to the property for return visits, but visitors must have been attracted to the property previously to make this valid, hence the priority is given over to the activities mentioned earlier, such as marketing. There is no direct equivalence in small and medium business enterprises to be found in the

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8 Interviewee B, 7th February 2004.
9 Interviewee D, 2nd December 2003.
literature, however the Bolton report does mention information use and retrieval as a need, due to their failure to make use of published information and educate themselves.

Maintenance is also noted here with 55.6% of respondents indicating its importance, which again compares with the Garrod and Fyall study and the importance of conserving the historic fabric of the property.

The ‘other’ category, depicted in table 4.2, accounted for a significant 56 of the responses. Roles that arose from this category included administration, conservation and day to day management with 8 responses each and event planning, publicity and research with 6, 5 and 4 responses respectively. There were 28 other activities that were cited by establishments.

This is a long list and only emphasizes the fact that historic property managers have an extensive set of activities that form part of their everyday role. However within this list are many that could be described as being appropriate to activities operations that would be considered normal in any SME.

It is simpler to detail those that might come under the categorical headings of heritage or tourism. Under the heading of heritage we can find the activities of:

1. Archives
2. Conservation
3. Contents recording
4. Interpretation
5. Museum work
6. Research and development
7. Running of house and estate
8. Tenant liaison.
<table>
<thead>
<tr>
<th>Other categories of activity as indicated by property managers/owners/administrators</th>
<th>No. of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
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<td>Administration</td>
<td>8</td>
</tr>
<tr>
<td>Archives</td>
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<tr>
<td>Catering</td>
<td>1</td>
</tr>
<tr>
<td>Community relations</td>
<td>2</td>
</tr>
<tr>
<td>Conference work</td>
<td>3</td>
</tr>
<tr>
<td>Conservation</td>
<td>8</td>
</tr>
<tr>
<td>Contents recording</td>
<td>1</td>
</tr>
<tr>
<td>Day to day management</td>
<td>8</td>
</tr>
<tr>
<td>Director</td>
<td>1</td>
</tr>
<tr>
<td>Emergency procedures</td>
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<tr>
<td>Event planning</td>
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</tr>
<tr>
<td>Health and safety</td>
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<tr>
<td>Income generation</td>
<td>4</td>
</tr>
<tr>
<td>Interpretation</td>
<td>2</td>
</tr>
<tr>
<td>IT</td>
<td>1</td>
</tr>
<tr>
<td>Manage visits</td>
<td>1</td>
</tr>
<tr>
<td>Museum work</td>
<td>3</td>
</tr>
<tr>
<td>Personnel</td>
<td>1</td>
</tr>
<tr>
<td>Professional networking</td>
<td>1</td>
</tr>
<tr>
<td>Publicity</td>
<td>5</td>
</tr>
<tr>
<td>Purchasing</td>
<td>1</td>
</tr>
<tr>
<td>Research and development</td>
<td>4</td>
</tr>
<tr>
<td>Run house and estate</td>
<td>1</td>
</tr>
<tr>
<td>Tenant liaison</td>
<td>4</td>
</tr>
<tr>
<td>Tourism</td>
<td>1</td>
</tr>
<tr>
<td>Visitor management</td>
<td>2</td>
</tr>
<tr>
<td>Volunteer management</td>
<td>2</td>
</tr>
</tbody>
</table>

Table 4.2 Categories of activity denoted as “Other”, as indicated by property managers/owners/administrators
Similarly we find under the heading of tourism, the following:

1. Event planning
2. Manage visits
3. Tourism
4. Visitor management
5. Volunteer management.

This provides a considerable list of activities that could relate to small businesses, being:

1. Accounting
2. Administration
3. Catering
4. Community relations
5. Conference work
6. Day to day management
7. Director
8. Emergency procedures
9. Health and safety
10. Income generation
11. IT
12. Personnel
13. Professional networking
14. Publicity
15. Purchasing.

Considering there were 28 additional activities in historic houses and only 13 of these can be considered to be irrelevant to other SMEs, this represents a degree of similarity. The aspects of historic houses that are not activities for SMEs are largely curatorial, as seen in the first grouping of activities, or related to visitors to the property, as seen in
the second. More than half of the “other categories” can be seen to be similar between historic houses and SMEs, which is notable, although it must be borne in mind that the main focus of their activities is different. Referring back to earlier parts in this chapter the focus of historic houses includes maintenance of the historic fabric and education to promote the same.

Other characteristics of small businesses are that “few people are involved in either significant or critical decision making” (Williams and Bradlaw 2001, p.279) and a “lack of management experience and capability, a lack of specialist services in place to advise management, and a lack of time to consider the development of the firm” (Williams and Bradlaw 2001, p.279).

This last comment regarding time is another factor that affects small businesses. Owners spend an inordinate amount of time managing their business, creating considerable pressure on themselves and their families. It also notes that there is no advice available; but this is not the case, owners are likely to be unaware of what is available to them.

Bannock describes a typical day in the life of a small firm owner to provide his readers with an overall perspective of the pressures and strains that are placed upon them (Bannock, 1981). It is clear from his description that aside from the pressures of finance and staffing, having time with the family was almost impossible and his comment that “tea was about the only time they really had together” (Bannock 1981, p.11-24). This may sound trite but it is indicative of the time consuming nature of running a small business and the demands it places on the individual’s time and family.

The evidence gathered through the questionnaire survey and the interviews does provide some correlation with these statements, but there are also some disparities. Having reviewed the status of those managing the properties and additionally discussed property owners as a significant group responsible for managing properties, another group of individuals need to be considered. Where it is not the owner responsible for
the property, a nominated individual is responsible for the property and they may, or
may not, have support from additional staff.

These individuals are similarly bereft of management experience, but some do have
access to specialist services, especially those owned by English Heritage or the
National Trust.

Specialist services available through a heritage organisation have been highlighted in
the interviews by the following statements:

“We have an event department that set up any events that we are going to be
running that year”\textsuperscript{10},

“We don’t have any surveys on site but we employ people to conduct
surveys.”\textsuperscript{11}

While it is no surprise that any establishment under the umbrella of a heritage
organisation has support, the interviews that did take place did reveal access to a
network that if appropriately accessed and manipulated would provide a considerable
resource.

The individual plays an important role in both SMEs and historic houses. This is a
strong statement; it does however this varies depending on the historic house in
question. Those properties that are run by their owners are extensions of their owner’s
own personality and family desires (Burns and Dewhurst 1996). This is echoed by
some parts of the historic house sector. At one property the senior staff were quoted
saying that

“the majority of the ideas come from one person, the Duchess.”\textsuperscript{12}

\textsuperscript{10} Interviewee D, 2\textsuperscript{nd} December 2003.
\textsuperscript{11} Ibid.
\textsuperscript{12} Ibid.
Some historic properties do have similarities to SME owners in that their personality and desires are the driving force behind the business. Another characteristic of the SME ownership and management is that the style is “directive and paternal” and that the “top management is highly visible and close to the point of delivery” (Wong and Aspinwall 2004, p.50). Taking the latter comment first interviews from historic houses stated:

“The Duke and Duchess spent all day walking from table to table talking to people.”13

Additionally they also indicated that the property also followed a Japanese style management ethos, which was based on operating with a family ethos. As we have heard highly visible and dealing with customers as SME owner managers. Additionally from the same establishment the senior member of staff stated:

“If something happens and the Duchess does not know about it then I’m in trouble.”14

Again we see similarities where the owner is directive and clearly in charge. It also echoes another stated characteristic of the small business which is that the “owner is the manager at the strategic apex” (Wong and Aspinwall 2004, p.50).

This does not necessarily apply to all historic houses; there are a number that are managed by individuals representing a larger organization. Although these individuals have operational flexibility they are guided by the strategic direction and expertise made available by their parent organization, and consequently their employer.

Networking is a key characteristic of SME activity. Down argues that

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13 Ibid.
“Small firm managers’ skills and knowledge develop largely through their existing social relationships within their organizations and with other businesses and organizations in a network of relations” (Down 1999, p.268).

This leads to the thought that although they seek information from other sources it is of a limited nature. This could also apply to the historic house sector where:

“We have got a big enough network of people to talk to.”

This last quote is from a property which belongs to a network of properties who have an established reputation in the field and belong to a self supporting group known as the Treasure Houses of England. This provides support for its community and considerable influence within their sector; however this should not mean that other possible solutions and mechanisms are to be ignored.

Nonaka and Takeuchi make the comment that “personal and physical experience is equally as valuable as indirect, intellectual abstraction” (Nonaka and Takeuchi 1995, p.239). This emphasises that the activities undertaken, functions attended and interactions with their family and social network by the individual form a part of the tacit knowledge they hold internally that supports the management of the property. Nonaka and Takeuchi additionally said that “human knowledge is created and expanded through social interaction” (Nonaka and Takeuchi 1995, p.238). This reinforces that the social networks and interactions form an integral part of the background to the tacit knowledge held by individuals at historic houses and also SMEs.

In another sense of the term community historic houses are actively part of their local area and are seen to be socially active and supportive of their locality. Quotes from the interviews at properties provide a glimpse of their activities and perspectives.

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15 Ibid.
“We raise about £500,000 for charity [...] we are not just taking we are giving to the local community”

The late Duke who ensures his philosophy runs throughout the establishment

“takes great pride on never being able to look out of his window and not seeing someone walking in the park.”

These quotes are all from a single property, but others have a similar outlook, even if they are much smaller establishments. Two properties farther off the beaten track and just maintaining their family home rather than openly engaging with the heritage tourism boom said:

“We don’t do any events except charity events, the garden scheme and once year something for the Macmillan Nurses, the local ones or the two local hospices.”

and another takes part in the

“Scotland Garden Scheme because we open under the banner because that means they do some advertising and because it’s for charity.”

Charitable work and social engagement is a recurring theme for historic houses that are privately owned and that are a part of the local community. Where it differs is in comparison with those properties that are owned by the larger organizations, such as English Heritage. It is not clear if they hold charity events, but they do have disability policies and provide scooters for visitors, which is a subtly different approach to actively raising money locally and providing facilities for local people.

17 Interviewee B, 7th February 2004.
Although there is little research on the role of SMEs, Spence and Rutherford did investigate social responsibility and profit maximization for small firms (Spence and Rutherford 2001, p.126-139). Their research produced a typology resulting in four ethical frames into which owners of small firms views were placed. This typified owners into those which were had a profit maximizing priority (only interested in making money); those that had a subsistence priority (the survival of the firm); those that had enlightened self interest (good business ethics will have positive influence on the company); and those that had a social priority (social values integral to business and override profit maxims). Although the research did indicate that owners did move from one frame to another depending on the health of the business, the research did show that “the most commonly presented frames were the subsistence priority and the social priority perspectives” (Spence and Rutherford 2001, p.126-139). The authors indicated that although driven to succeed in their business those that had social priorities used their role in society to support social and ethical choices. Although this does not mean that they are as integral to the local community in the same way as historic properties, it does indicate that they have strong principles that guide their decision making, which is not always profit related.

4.3 Similarities between small businesses and historic houses

The information presented in section 4.2 is presented as a matrix in table 4.3 enabling the reader to see at a glance the similarities between the activities at historic houses and SMEs. However, this should be noted with a word of caution, as some of the activities which can come under the same heading could be either substantially or completely different. Due to this some headings have been given a ‘no’ rather than a possible ‘yes’. For example education could be considered to belong to both SMEs and historic houses, but when reviewed the emphasis is completely different. In historic houses education is about educating the public about history and the property. It could be considered that SMEs would get involved in education, but not in the same way. If it is educating the customer then it is marketing, if it is the staff then it is training, consequently ‘no’ appears in the matrix. Another area of possible mismatch is that of
security. Historic houses are concerned with protecting a range of properties and artifacts and security is both expensive and of paramount importance. Some SMEs may have to protect premises, although that will depend but it is not of a specialist nature as it is at historic properties.

When questioned regarding the use of information that was used in the running of the establishment 5.5% of the sample population did not answer the question because they did not feel that it was relevant to their activities. If an establishment was very small then it may be run only by family members, and not all of the categories of information, for example that of personnel, would be appropriate. Some properties however, do not see themselves as operating as a business with a need for a diverse range of information. This corresponds with the data that was gleaned from the literature review.

Owners and managers of the properties have always been proud of the heritage they are protecting and have a personal interest in preserving the historic fabric for which they are responsible as noted by Lord Duncan-Sandys and by the chairman of the National Trust at their AGM of 1967 in section 2.3.

It puts the focus on the conservation of properties, not on tourism. This is increasingly difficult with the high numbers of visitors all historic properties are receiving as evidenced by the figures quoted earlier in the research. It is important not to lose sight that heritage as a product cannot exist if tourism is allowed to expand to the detriment of conservation. It is this that drives many owners to take care of their properties; it is not always economic necessity, but a need to preserve the property for future generations.
<table>
<thead>
<tr>
<th>Activity</th>
<th>SMEs</th>
<th>Historic Houses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Administration</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Archives</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Budgeting</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Catering</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Community relations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Conference work</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Conservation</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Contents recording</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Customer relations</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Day to day management</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Director</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Education</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Emergency procedures</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Event planning</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Grant Aid</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Health and safety</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Income generation</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Insurance</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Interpretation</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>IT</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Liaison</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Manage visits</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Marketing</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Museum work</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Personnel</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Professional networking</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Publicity</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Purchasing</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Research and development</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Run house and estate</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Security</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Surveying</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Staffing</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Tenant liaison</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Tourism</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Visitor management</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Volunteer management</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Table 4.3 Matrix of SME and historic house activities
Millar states that:

“Charging is the most contentious issue of all, creating an almost impossible ethical dilemma. The dichotomy between heritage as a community resource and focus for national, regional and local identities that should be freely available for the enlightenment, education and enjoyment of visiting populations from around the world, and heritage as a product for commercial consumption, revolves around the question of admission charges” (Millar 1999, p.1-21).

Properties are faced with this dilemma and charging is not always of paramount importance to establishments. The cost of collecting admission charges may not be cost-effective and donations may be more suitable for small properties. Additionally some properties take this to further extremes.

“When we’re open all the money is given to charity.”

Actually making money for themselves is not the aim of most properties, it is about maintaining the historic fabric for future generations and because of this the approach to managing properties is not typically like a small business.

It would be remiss if this research did not point out that many small businesses are also not primarily motivated by money. Stanworth and Gray, reviewing the Bolton Report, stated that “money, it was suggested, was not their (small businesses) prime source of motivation: there is a quality of life issue; personal involvement in owning and managing one’s own firm led to a greater satisfaction on a number of fronts all associated with the notion of ‘independence” (Stanworth and Gray 1991, p.152).

Despite this a small firm must still balance its books at some point just to exist. This is not necessarily so with the historic house sector which has an outlook that differs from that of small businesses. Historic houses have a shared belief system that has enabled

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networks to be created to support them. Examples of networks in existence that privately owned houses have access to include the Historic Houses Association (Historic Houses Association 2001, p.4-7) and the Treasure Houses of England (Treasure Houses of England 2005). This is an advantage that SMEs do not have and they will have to work harder to find support. Although the Department of Trade and Industry does provide significant support for small businesses, those that run the businesses do have to work their own way through a considerable amount of information, if they have the time. Businesslink provides a raft of information for different sectors from construction, through education to manufacturing (Businesslink 2005). This provides guidance on the following areas:

1. Starting up
2. Finance
3. Taxes
4. Employment
5. Health and safety
6. Ideas exploitation
7. IT
8. Sales
9. International trade
10. Growth
11. Buying or selling a business.

This is a considerable amount of information that is being made available, but there is not necessarily someone available to interpret it for them. Further support, in the form of Knowledge Transfer Networks and Collaborative Research and Development grants, is also available from the Department of Trade and Industry (Department of Trade and Industry 2004, p.6-7).
4.4 Information use

The questionnaire survey asked the property managers to state what information they required on a regular basis to run the establishment. The types of information that might be used in day to day activities were pre-specified to help establishments focus on their needs and to help them make a selection. This may have provided those houses that do not perceive themselves as being users of information with a method of answering the questions and giving unintentional guidance to them by structuring it in this way. The alternative, less structured way would have been to let users select their own types of information. This would more likely result in few suggestions being made by properties or many responses indicating that they do not use it at all as evidenced by the 5.5% above who, even with guidance, did not feel that it was sufficiently related to their work.

To give some context to their operations and to help the respondents understand what they were being asked the types of information were categorised into three main areas, these being:

1. management (information used in day to day operations)
2. public (information to inform others)
3. research (information used to solve problems).

Each of these sections were further subdivided to enable the respondents to pick specific instances of activities that they use information for. The management section was further subdivided into:

1. maintenance
2. financial
3. personnel;
4. events
5. legislation
6. catering  
7. estate inventories  
8. transport.

Table 4.4 depicts the results for the overall area of management, ranking the activities in order of importance according to the respondents. Individuals were allowed to choose as many of the activities as they wished, for which they required information to support them in that activity. If they felt they did not require information for that activity then they simply did not select it. The first column indicates the number of individuals who positively stated that they required information for that activity. For example maintenance was chosen by 151 of the respondents making it the most important activity that requires individuals to find information, although not specifically defined most respondents gave the impression that this largely concerned the fabric of the building.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of positive responses</th>
<th>% of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance</td>
<td>151</td>
<td>75.1</td>
</tr>
<tr>
<td>Financial</td>
<td>147</td>
<td>73.1</td>
</tr>
<tr>
<td>Personnel</td>
<td>137</td>
<td>68.2</td>
</tr>
<tr>
<td>Events</td>
<td>131</td>
<td>65.2</td>
</tr>
<tr>
<td>Legislation</td>
<td>121</td>
<td>60.2</td>
</tr>
<tr>
<td>Catering</td>
<td>105</td>
<td>52.2</td>
</tr>
<tr>
<td>Estate inventories</td>
<td>72</td>
<td>35.8</td>
</tr>
<tr>
<td>Transport</td>
<td>35</td>
<td>17.4</td>
</tr>
</tbody>
</table>

Table 4.4 Information used in managing operations at historic houses ranked in order

Most categories received high responses with the exception of transport. Transport is likely to be an activity that is largely out of the hands of establishments and will depend on local planning authorities or private companies. The larger properties may be able to
have some influence on national tourism operators, but the smaller properties are likely to only be able to achieve some impact at a local level through discussion with councils and any related and relevant local private transport enterprises. Of those establishments that were interviewed, only a manager at a large property in a rural location made any comments regarding transport as an information need. Their comment was:

“"We have a free car park open 365 days of the year giving open access to the park."

Their needs in this respect are to provide a facility to enable visitors to come, despite their location.

The highest responses were for maintenance and financial information which were selected by (N=151) and (N=147) of the respondents. These again highlight the need to maintain the historic fabric of the property. One owner when interviewed stated:

“"Maintenance is the main thing – the big thing.""

This shows how important this need is; often the establishment’s main attraction is the historic building, which must be effectively maintained. They must also pay special attention to financial matters, including funding from the Heritage Lottery Fund to help towards the cost of maintaining this fabric. This was quoted by 61 properties as an important source. A response of 121 for legislation indicates that properties also need to understand complex matters of law, such as taxation, employment and planning to ensure the continuation of activities at the historic house.

A report by Capital Planning Information analysed six areas of information needs for businesses and is discussed in section 2.6. It is possible to draw some comparisons with those categories described in the Capital Planning Information report. Premises is

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similar in description to that of maintenance. Although there is a difference between maintaining the historic fabric of an historic house and running businesses premises that might include industrial units, some of the aspects will be similar, such as planning and construction, although the methods and resources used might be substantially different. Where they will differ is with the regulations concerning any work. Historic buildings must also comply with the regulations concerning listing and restrict the manner in which any work can be performed.

The owner of one historic house stated:

“Well, for the house we are looked after by the architect, who’s looked after it for years.”

The use of an architect is not uncommon for historic houses for the reason in the quote: they have always done it that way. It is also a specialist activity in historic properties and requires particular expertise. Small businesses are unlikely to require this level of support for their premises. Although not requiring architects small businesses do employ accountants. Bannock noted that in a typical day an owner would be constantly looking at the figures and then at strategic points talking to their accountant (Bannock, 1981). This is notably different from historic houses who often are guided by them. One establishment said:

“I’ve got the lawyers to ask if there is a problem and to keep an eye on it or Strutt and Parker […] I have frequent meetings with the agents.”

The impression gained is that historic houses are more inclined to go to their contacts who have probably been involved with the family or property for some time, whereas small businesses are more reliant on the owner. In both cases we can see that tacit knowledge is important to both. Nonaka and Takeuchi’s research within Japanese

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22 Interviewee B, 7th February 2004.
23 Ibid.
companies noted that “interaction between tacit and explicit knowledge is performed by the individual” (Nonaka and Takeuchi 1995, p.225).

Individuals at historic houses, especially the owners, are guardians of the knowledge at the property. Some they may record, yet there will be many things that they do not realise are important or, alternatively, are things that they simply do on a day to day basis.

Tacit knowledge is discussed in section 2.7.2 in relation to historic houses and how it is difficult to pass on knowledge to future generations as much of it is experiential. This is important because information at historic houses is often ‘owned’ by the individuals managing the property, especially where the family are owners. The tacit knowledge of the individuals running the property is paramount as they are the ones who are able to place the recorded information in context and decide on appropriate courses of action using their own experiences.

It has already been noted that historic houses need to be conversant with the Heritage Lottery Fund to help their financial situation. Similarly SMEs also need access to funding where possible and would look to the Department of Trade and Industry for support (Department of Trade and Industry 2004, p.6-7). Properties are very aware of the bottom line and constantly review the situation. One individual said:

“the main information that I am involved in is probably financial information, normal budgeting, such as if I stick to budget or exceed expectations, just like any other business.”

Despite funding differences the financial balance sheet is very important to both historic houses and SMEs.

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Personnel received a 68.2% response from establishments, which is also not surprising when the replies that were received quoting the Heritage Lottery Fund also selected volunteer agencies as a major source of information and exchange. Historic houses rely heavily on volunteers and therefore will spend considerable time on dealing with personnel matters for those employed on paid permanent contracts and volunteers. Employment is quoted as an information need of small businesses by the Capital Planning survey discussed in section 2.6. The difference is that their personnel will not be volunteers; they will be paid for posts. This is a considerable difference, as volunteer management requires different techniques to that of paid employees to achieve effectiveness, as historic houses do not have the same kind of leverage over their volunteers as small businesses have over paid staff.

Activities presented for respondents to choose from were gathered from the literature. The importance of those activities that had been revealed by the literature review was confirmed by the survey results. Major sources of income for establishments are events and catering which had responses of 131 and 105 respectively. These are necessary for historic houses to ensure that visitors, who do come, enjoy their experience and want to make repeat visits. These events do not feature in the main body of small businesses literature as they are specific to historic houses operations, but not to small businesses.

As with the previous table, Table 4.5 shows the ‘public’ area from the survey which included activities that required providing information to others. This included Marketing and education.

Again respondents had to positively select the activity to indicate its importance to them. Of the respondents 160 selected marketing indicating its importance and how much time and energy is devoted to promoting the property to the public. Despite the need to preserve the historic fabric there is considerable emphasis placed on tourism. This is consistent with the literature review where both conservation and tourism were found to be of importance to establishments.
<table>
<thead>
<tr>
<th>Information sources</th>
<th>Number of positive responses</th>
<th>% of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>128</td>
<td>63.7</td>
</tr>
<tr>
<td>Marketing</td>
<td>160</td>
<td>79.6</td>
</tr>
</tbody>
</table>

Table 4.5 Information used to inform visitors at historic houses

Information sources relating to education enable the public to understand the importance of the historic house and its role in both local and national history. This type of information received a high response with 128 properties stating this as necessary at their establishment. Historic houses have for some time acted as a focus for historic events, encouraging links with local schools and other organisations. This achieves two objectives for establishments by informing future generations of visitors and promoting their facilities.

Similarity can be seen between ‘markets’ in the Capital Planning survey, noted in section 2.6, and ‘marketing’ in the responses received in the questionnaire survey. This similarity however is only superficial. Marketing is the ability of the small firm to be able to predict who they are selling to and to ensure there is a market for their goods. Beyond that they will then need to promote their goods to their chosen market. The difference is that historic houses are largely concerned with promoting their property to the community.

One owner interviewed said:

“I have a small budget for advertising and I go in […] probably 8 or 10 magazines,”\(^{25}\)

while another said:

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\(^{25}\) Interviewee B, 7\(^{th}\) February 2004.
“The information for the public we definitely have educational stuff and marketing stuff – leaflets on site.”

These all convey the impression of the less strategic promotional activities that do not analyse and monitor their markets before producing promotional material.

Table 4.6 covers the area of information required for research activities at historic houses which were:

1. surveys
2. conservation
3. preservation.

Conservation records a high response rate almost equivalent to that of marketing. The literature also indicates that historic houses place conservation and marketing as equally important to their activities. The survey confirms this view with conservation and marketing recording figures 154 and 160 respectively. The two activities require balancing carefully as marketing can result in more visitors, which can have an adverse effect on the fabric of the property. The figure for information to help with preservation is also high with 125 adding to the overall impression and importance of protecting the heritage. Preservation is key as it is usually a tool or method that is used to prevent deterioration of the historical asset whether carpet or stone wall. Conservation as an activity focuses more pertinently on the activity of bringing back an asset to condition by intervening through technical means. Therefore the balancing of activities is extremely important to historic houses.

26 Interviewee D, 2nd December 2003.
Table 4.6 Information used to solve problems at historic houses

<table>
<thead>
<tr>
<th></th>
<th>Number of positive responses</th>
<th>% of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surveys</td>
<td>120</td>
<td>59.7</td>
</tr>
<tr>
<td>Preservation</td>
<td>125</td>
<td>62.2</td>
</tr>
<tr>
<td>Conservation</td>
<td>154</td>
<td>76.6</td>
</tr>
</tbody>
</table>

Surveys received a considerable response with 120. Although it is unclear what types of surveys are used by historic houses to solve problems, it is clear how important they are. It includes visitor surveys, which is confirmed by one group of staff stating:

“We employ MORI to do polls here,”

but could also include surveys of the property, wildlife and other aspects of the environment.

Only 21 of the sample population selected ‘other’ as a response, most of which were of special relevance to the property concerned, including classification of plants and river heights. A small number (N=4) indicated that all their information was passed directly to them by another organisation, such as the local authority. The two items that stood out as distinctly different from the categories previously mentioned were health and safety and financial information as being important in the operation of the historic houses. The financial aspects we have already covered, while health and safety do belong under the umbrella of legislation, but when interviewed one member of staff insisted, when asked if any information need was missing, that:

“health and safety – this is day to day information,”

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27 Interviewee D 2nd December 2003.
indicating how often this information is required. Legislation is also noted as an information need by the Capital Planning survey, (See: 2.6), and again shows some of the similarities between small businesses and historic houses.

4.5 Conclusions

From the information obtained from the research questionnaire survey and interviews presented in this chapter conclusions can be drawn to address the research questions. Despite the differences of ownership of properties the number of responses received show that historic houses do broadly operate with managers, owners or administrators. There are a large number of job titles also used across the sector but most are used infrequently, the majority are covered by those titles mentioned previously. Larger properties are more likely to have managers responsible for the running of the property. The level of activity and attractions available for the public are greater and hence income and the ability to “buy in” staff becomes possible. With smaller historic houses the possibilities are smaller and it is more difficult to achieve the same level of activity than at larger establishments.

There are similarities between SMEs and historic properties, but there are also differences in the detail provided by the interviews, questionnaire survey and literature. There is some similarity with properties where the owner is manager. However this is no more than up to a fifth of historic houses where the rest are managed by another individual or organisation. There are therefore parallels with some properties and small businesses, but only a proportion of the total historic house sector.

The discussion in this chapter reviewed the management needs of small businesses and historic houses and placed an emphasis on the importance of financial matters. It indicated that small businesses focus on business related activities such as the organisation, costings, marketing and personnel, whereas in contrast historic houses place the most emphasis on the property through conservation and accessibility. Beyond this properties place the visitor at the centre of their expectations seeing
education, relevance and quality as important aspects of their mission in the sector. Equally small businesses have the customer at the centre of their activities. There are notable similarities across operational activities, such as finance, personnel and publicity. However what separates them is their focus and missions.

Historic houses actively go out of their way to ensure that the historic fabric of the building is maintained as this is the major asset of their businesses, or the background against which all activities take place. It is this fabric that dictates many of the other activities, owners and managers will reduce other aspects of their activities or cease them entirely, e.g. marketing, should the fabric be threatened or need remedial work. Establishments are usually closed during certain seasons to ensure that these requirements are met.

Historic houses have some very special characteristics which require particular expertise and support. In this they are different to small businesses and the fact that many historic houses are supported by larger organizations is another considerable difference. With the support of a larger organisation there is somewhere else to turn when a problem that requires solving is beyond the local information at their disposal. It can be seen that the approach to solving problems is very different. A historic house owner may turn to their accountant, while the owner of a small business will think twice about spending money in this way whatever the outcome. Although it may seem preferable to save the money and solve the problem oneself, sometimes the most effective solution is to purchase the expertise required.

The data that has been collected indicates that there is a dependence on individuals in both SMEs and historic houses. Historic properties have a similar approach to small businesses and similar characteristics being close to their customers and in the way that they manage the business/property. The information received from the interviews indicated that even those properties that are owned by the large organisations such as the National Trust do have a considerable amount of autonomy. However there is a difference between SMEs and some sections of the historic house sector. Some historic
houses have the resources of a large organization behind them, such as English Heritage, from which they can get the information and/or help they require, they can also be directed strategically by the overarching organization and by the methods it proscribes for its operations.

Similarities exist between the methods of networking used by SMEs and historic houses. Small businesses do rely on the people and organizations they work closely with and this is echoed in the historic house sector where those independently owned are members of a wider social context from which they can enjoy support and information. Examples of this wider network can be found in membership of both the Historic Houses Association and the Treasure Houses of England. This wider social context of the historic house gives an advantage over small businesses, as it occurs on a larger scale than those of a small business. Support is available for SMEs however it is likely to be locally known contacts and also requires the individual to make use of the information and interpret it for themselves. In the historic house community there is much more scope for the property to have that information interpreted for them. Additionally historic properties do have access to organizations such as English Heritage for help and advice even though they are not owned or run by them, providing them with an advantage over other sectors.

In a social context the discussion above indicates that SMEs and historic houses are similarly rooted in the local economy, even if some do have an international reputation, such as Chatsworth House. Historic houses are a significant part of the locality whether through the provision of facilities or for actively giving to the community through charity events. Although there is little evidence to support this it can be seen from the research that many small businesses do have social priorities and one only has to look at local events such as children’s football teams or school fetes to see that they have local sponsors.

What should be noted is that the Bolton Report indicated that small business owners do perceive that they have a need for information use and retrieval. At no time was this
mentioned as important by historic houses. This is a noticeable omission and leads to the conclusion that it is either not considered as important or that it is not considered because there are networks already in place that provide for their needs. Noticeably historic houses make much of the need to provide for their visitors through education and relevance to the individuals personal situation. They perceive that information is important for their visitors, but do not see how the same need for knowledge applies to them.

When asked about the information that they used historic houses indicated that maintenance needs were of the highest priority followed by financial. They also indicated that personnel information was of high importance as was legislation. Of the eight categories available for managers at historic houses to select as types of information used, six were selected by over half of the sample and some as much as three quarters of the sample. This provides the view that the information is important to most of the sample. When these eight are compared to six areas of information need from the CPI survey on SMEs there are many similarities. Financial information needs are quoted by both; personnel or employment also; legislation additionally; and finally maintenance or premises are all areas of similarity. Other areas were also raised in the discussion earlier. We can conclude many areas of similarity in the requirements for information in historic houses and SMEs. However the emphasis can be quite different as noted earlier, the historic fabric takes precedence over many aspects of heritage work, while financial needs are of more importance to SMEs, needs may be similar in broad ways but at a micro level they are quite different.

Although the research on SMEs information needs is limited it has enabled some comparisons with historic houses. There are a number of similarities, but the emphasis on these aspects is tangibly different and most importantly those aspects of most importance to historic houses are not those of most importance to small businesses.

Additionally it might seem from the discussion above that the characteristics of owners do coincide but the priorities are different, in some senses it might appear that historic
properties who have been part of their community for, in some cases, centuries have a more social and cultural perspective on their business.

It is these differences that require special attention as it is these areas that indicate the distinct needs of historic properties. Paying attention to these differences can help discover needs and thus enable necessary improvements to the provision of information within historic houses.
Chapter 5

Diversity of activities in historic houses

Historic houses have a diverse range of functions and consequently have a diverse set of information needs. This ranges from the education of their visitors, to the conservation of the properties, and then to the management of the staff and provision of services and facilities for their visitors. The wide variety of activities taking place at historic houses would suggest that they have a wide range of information needs.

5.1 Activities that take place at historic houses

Figure 5.0 provides a graphic representation of the extent of the activities that take place at the establishments that were surveyed and the relative importance they have across the sector. The nature of each individual establishment will dictate whether it offers a wide variety of activities or focuses on a small number, but the survey reveals the general consensus across the sector about the major areas of activity.

5.11 Conservation versus visitor access

The activities most frequently reported were conservation and visitor management, which were both selected by 144 of the properties surveyed. In both cases this should not be regarded as inappropriate. Conserving the heritage must be the main priority for properties, while it is imperative that managing visitors is a major activity if they are to ensure conservation is to be effective. It is to be expected that these activities appear together if establishments were making appropriate arrangements to protect their site for future generations. This is consistent with the literature which found that heritage
property managers placed conservation above all other aspects of their work (Garrod and Fyall 2000).

Garrod and Fyall’s research (Garrod and Fyall 2000) revealed that there was consistent agreement that conservation had the highest priority. One of the owners interviewed stated that:

“maintenance was the main thing - the big thing.”

This clarifies the need to maintain and conserve the historic fabric of the property, above all else. This same individual said:

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“when we are open all the money is given to charity.”30

They do not appear to be interested in profit as such but in the preservation of the property for future generations.

One property that was interviewed stated that they:

“had a grant to restore the roof...” which “took up most of the maintenance fund.”31

This indicates how far they were prepared to go to maintain the property for future generations, taking a grant to ensure that the property was maintained, and also ensuring that they would have visitors to the property, as no grant is given without the property being open to the public for a specified time.

This shows a determination to protect the heritage for future generations above other uses of the attraction. It must be borne in mind however that the research did not focus wholly on those managing historic houses; local authority officers were surveyed as were consultants, opening the possibility that they do not have a personal connection to the property and consequently view the conservation of the property over and above the development of the property.

This need to conserve above all else is evident in other research; for example Croft states that heritage managers see themselves as guardians of the heritage and not as a part of the “tourism business” (Croft 1994). He was a Regional Director for the National Trust in Scotland and is quoting directly from the experience of his own staff. He further states that this attitude is unsustainable and that “there is no point in conserving buildings and contents for the benefit of the nation if people cannot have access to them” (Croft 1994, p.169-178). This is the quandary in which historic

31 Interviewee B, 7th February 2004.
properties find themselves. They need to allow access for the public to give meaning to
the conservation of the heritage attraction, yet still protect the heritage asset.

It is notable that when interviewed as part of the research one manager stated that they
hold:

“information on the conservation of the castle on site,”\textsuperscript{32} and that they get the
public “requesting information on […] conservation issues.”\textsuperscript{33}

Garrod and Fyall found in their study that, like Croft, heritage managers place
accessibility second only to conserving the heritage. They state that if “people are
prevented from experiencing a heritage asset; it can no longer be considered part of
their heritage” (Garrod and Fyall 2000, p.691). The Policy Studies Institute report
carried out by Casey, Dunlop and Selwood states that some members of the Historic
Houses Association indicated that it was uneconomical to open their houses to the
public as the damage caused cost more to conserve than the income generated through
giving access to visitors (Casey, Dunlop and Selwood 1996, p.140-158).

Despite the pressures of rising numbers historic properties have developed techniques
to combat this. The major technique is to close the property to the public during the
winter months. This happens in many historic properties to allow maintenance to be
carried out and also ensures that the inclement seasons do not have an adverse effect on
property interiors by dirt being transported throughout the property on visitors’ feet.

In section 2.4.1 it is noted that most historic houses close in October and do not reopen
until Easter of the following year to allow properties to carry out tasks that could not be
performed during the summer months due to visitor demands. Closing down and
adopting methods to restrict visitors as noted in section 2.6 is important for historic
properties as it enables them to maintain and protect the property.

\textsuperscript{32} Interviewee D, 2\textsuperscript{nd} December 2003.
\textsuperscript{33} Ibid.


5.12 Education at historic houses

Figure 5.0 indicates that of the historic houses who responded to the survey 122 stated that educating the public was important to their work. When a member of the public makes a visit to a historic property the establishment can begin the process of education, no matter whether the visitor is drawn to the property primarily to be educated or for any number of other reasons. They are able to provide information for visitors on the historic significance of the property and on the importance of conserving historic houses as part of the nation’s heritage. In addition the property will also be trying to convince the public to spend more and also entice them into making further visits to discover more either at the same property or others, thus providing a benefit to the sector.

In section 2.4.4 Garrod and Fyall’s research is discussed in relation to the importance of education within the heritage sector. In the same section education is also noted as a major priority for historic houses by Alan Rogers as it has a number of purposes including awareness, appreciation and concern for the historic environment. In the last 10-15 years changes have occurred in the cultural sector. The evidence of the Anderson report, which reviewed learning in museums, presented a picture that the government described as being “patchy” (Anderson 1997; DCMS 2000). This helped to bring about a more directive approach by the government according to Hooper-Greenhill (2007, p. 6) resulting in consistent calls for museums, libraries and archives to develop their provision for learning for all. The government charged Resource, (now the MLA), with developing a framework for learning in museums, libraries and archives. The resultant framework, Inspiring Learning for All, encouraged staff in the sector to understand better what education and learning involved so as to increase educational provision. To enable the sector to measure this, a methodology was devised through the Research Centre for Museums and Galleries on behalf of Resource/MLA. The Learning Impact Research Project (LIRP) developed Generic Learning Outcomes (GLOs) against which users of educational services could be measured to determine the impact of learning at museums (Hooper-Greenhill 2007, p.44).
These reports and the direction the Government has taken regarding museums, libraries and archives have moved education forward in the cultural sector. A report from the Museums, Libraries and Archives Council in 2006 reviewed provision by comparing it with Anderson’s findings to find that the picture had greatly improved as exemplified by an increase in educational posts in museums from 755 to 1,171 and that 69% of museums had an educational policy as opposed to a previous figure of 23% (Anderson 1997; MLA 2006).

Historic houses are not all embedded in the public sector, with the exception of English Heritage, and as such are not privy to the same constraints or funding as those reviewed by the MLA. Education is central to the mission of historic houses and heritage organisations, such as the HHA, English Heritage and the National Trust, and it is a major part of their mission to promote the historic importance and need for preservation of historic houses. The importance attached to education by property owners becomes notable when it is considered that it can be an important vehicle for the marketing of their properties. The educational facilities being made available by English Heritage are endeavouring to bring tomorrow’s generations into contact with the past and to make it meaningful in a current context. Much of “current context” will revolve around school work as school is a defined part of the day for children and any support offered to schools is important. The English Heritage website provides resources under its Learning and Resources section, including photo collections, archives, databases and publications (English Heritage 2006). Additionally within this resource area is a targeted education section that provides a children’s area with games and activities, as well as the organizations learning strategy and resources for teachers. This is a considerable resource which is freely available to the public and educational visits to English Heritage sites designed specifically for schools are also available. It is difficult to know how well this is used and also how well defined the link is between online resources and the properties themselves. It is worthy of further research, even if just for the benefit of English Heritage and other organisations. As noted above English Heritage do have access to government funding and have developed their educational
activities as noted below in comments from properties. Historic houses may undertake educational activities to a greater or lesser extent than museums, archives and libraries, but being effectively in the same marketplace would at least drive competition for visitors and the need to keep apace with educational developments. As noted in 2.4.4 the *Power of place* reported that 98% of those surveyed stated that the heritage is a vital educational asset for the nation. This is echoed by interviews at historic houses which revealed that when talking about provision of education for visitors they:

“have educational stuff and marketing stuff” and “we have an education room on site and we are going to adapt it so that we can put information on the walls.”\(^{34}\)

Other historic houses also focus on educational activities: One said:

“We do have school parties here,”\(^{35}\)

while another said:

“We have to get out to schools that we have a service to offer.”\(^{36}\)

Education is important to historic houses because they are using the historical background of the property to attract new and repeat visitors with new perspectives.

In 2.4.4 Garrod and Fyall argue that the best way to educate is if the presentation is entertaining. It is clear from their work that some individual’s perceive education and recreation sometimes as the same thing. Hooper-Greenhill discusses the term edutainment which combines both education and entertainment in the “recognition that learning and enjoyment work very well in conjunction with each other” and is

\(^{34}\) Interviewee D, 2\(^{nd}\) December 2003.
\(^{35}\) Interviewee E, 15\(^{th}\) August 2005.
\(^{36}\) Interviewee F, 24\(^{th}\) November 2003.
The interviews with historic houses provide an interesting twist on the education discussion. One property has given part of their property over to:

“the Edinburgh School of Food and Wine.”

This has a twofold function, it is providing education, but also recreation, and additionally brings people to the property.

5.13 Recreational activities

Staging events, maintaining gardens and providing catering facilities received results of N=129, N=125 and N=99 respectively. These were the most important activities indicated by historic houses after conservation and visitor management. It is indicative of an emerging trend for historic properties to be more actively engaged in tourism type activities.

This was reflected in the literature review in 2.1.3 by the discussions surrounding the increase in visitors to historic houses. The relationship between heritage, leisure and tourism is inter-related, but not interdependent as noted by Herbert emphasizing the fact that historic houses act as foci for formal education and conservation without being related to leisure or tourism, equally they can carry out these laudable aims while still being a tourism attraction. The discussion in 2.1.3 shows that there is an increase in the

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visiting of historic buildings by the public during their leisure time and that consequently there has been an increase in heritage tourism. This is confirmed by a growth in heritage organizations providing further evidence of the public’s growing interest in historic houses as noted by Cornforth in section 2.1.3.

Membership figures for the National Trust are discussed in 2.1.3, the figures for which are depicted in figure 5.1, indicating the public’s interest in helping to preserve this heritage and to visit. Although growth is likely to decelerate in the future the membership of the Trust is large and accounts for many visits to historic properties.

![Figure 5.1 National Trust Memberships](image)

Having achieved a certain level of visitors, properties need to maintain this level and where possible increase this on an annual basis. There are many ways that this can be done, which is reflected in the activities that establishments undertake.

Staging events, such as concerts, and attracting visitors to enjoy their gardens are important activities for establishments. They provide a source of funding that can help support the conservation of the property. Providing catering facilities makes the visit more enjoyable for those same visitors and provides much needed income for the historic house.
Further confirmation of this trend towards a more tourism oriented approach is found in the following results from the survey:

1. Merchandising was an activity for 87 properties that were surveyed
2. Corporate hospitality was provided by 72 of the establishments surveyed.

This gives some indication of the need for other income streams above and beyond the fees paid upon entry by visitors to historic houses.

Janiskee’s work on events at historic properties is discussed in 2.4.3 and provides descriptions on how events can create publicity and attract visitors for both education and enjoyment.

This attests to the point that activities are leisure based, but that they can also be a “means to an end” for some properties. If the public can be attracted to the property then it is possible to undertake activities, such as education, once they are through the door. An example of this can be found at one historic house where the administrator said:

“For example the education department might have a good way of doing an Easter Egg Trail.”

This indicates the use of edutainment as discussed above where recreational activities are combined with educational aspects to enhance the visitor experience.

Activities organised by both the National Trust and the Historic Houses Association as taking place at properties are all intended to attract the local population and visitors from further afield advertising them as noted in 2.4.3. They are not the only ones, as those properties in private ownership have their own events and act as a focus for the local community as noted in 2.4.3 often focusing on ‘country’ based pursuits and

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38 Interviewee G, 24th March 2004
themes, but do also stretch to more grandiose themes such as orchestral concerts or theatre, much as they may have done in centuries past. These activities do not rely on the house being open, but provide a “historic” backdrop for the event.

One property interviewed for the research holds regular re-enactments at their property and consequently has a relationship with a re-enactment society. Additionally they feature in magazines such as Skirmish that brings them additional publicity. Research studies conducted by RCMG intended to follow up the development of the GLOs and obtain a national picture of museum-based learning provide good evidence of activities in the sector. Students visiting Gressenhall in Norfolk attended museum workshops that presented a historical re-enactment but also allowed students to debate as part of the workshop which presents the opportunity to relate a new experience to what they already know. This type of activity therefore forms “experiences and tacit knowledge that may be called upon in the future” (Hooper-Greenhill 2007, p.176).

Although Garrod and Fyall’s research in 2.4.2 indicated that recreation was a low priority for those running historic houses it is clear that there is a great deal of recreational based activities at historic houses. It should be noted that it is difficult to actually decide where the boundary between recreation and education is to be found. Consequently any research that asks those responsible for maintaining historic houses relies on individuals’ own perceptions to decide whether something is classed as recreation or education.

5.14 Other activities

Parkland, farming and forestry did not receive such high responses from property managers. Parkland received 70 responses, farming 47 and forestry 48. Historic houses may have a considerable estate attached to the property and hence there may be an area of parkland to take care of, as well as woodland and/or farmland. Parkland is often open to the public and could also be considered an effective incentive to attract visitors. The burden of looking after an estate, which many historic houses form the vital core of, is
not inconsiderable and can affect the activities and functions at the property. Successful diversification can make a property successful, whilst relying on a single method of income, such as agriculture, can restrict, and if not severely curtail, a property’s ability to conserve the historic fabric.

The “other” category for activities received 73 responses. It indicated that while establishments do undertake similar activities they also possess some considerable variety. Responses to “other” included historic house (N=13), hotel (N=5), tenants (N=9), weddings (N=5), museum (N=13), and exhibitions (N=3) as shown in table 5.2.

There is no particular pattern to these activities. It is not possible to suggest that many historic houses have a particular focus, beyond the fact that a number see the house as a significant and notable activity within their range of activities. Additionally we can see that museum activity is also considerable. This is not unexpected as curation of the artefacts collected and generated by generations of families within these properties, as discussed in the literature, has provided a legacy of historical artefacts that are also of intrinsic value as part of the house or without.

The additional activities also begin to indicate the growing aspects of corporate hospitality in the sector, beyond those already noted in section 5.13. Conference centre, weddings and hotel are all mentioned in table 5.2. Facilities now being made available at historic houses now include weddings, banquets and fairs of all description, all of which are noted in section 2.4.2. Some historic houses notably only allow private events, thus restricting access to the property. Although there may be some educational merit, these are principally leisure activities and though recreation is given a low priority by those at historic houses, the presentation by properties to the public gives a very different picture as noted in section 2.4.2.
<table>
<thead>
<tr>
<th>Activity</th>
<th>No. of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museum</td>
<td>13</td>
</tr>
<tr>
<td>Historic house</td>
<td>13</td>
</tr>
<tr>
<td>Tenants</td>
<td>9</td>
</tr>
<tr>
<td>Weddings</td>
<td>5</td>
</tr>
<tr>
<td>Hotel</td>
<td>5</td>
</tr>
<tr>
<td>Tourism</td>
<td>4</td>
</tr>
<tr>
<td>Sports</td>
<td>4</td>
</tr>
<tr>
<td>Visitor attraction</td>
<td>3</td>
</tr>
<tr>
<td>Retail</td>
<td>3</td>
</tr>
<tr>
<td>Exhibitions</td>
<td>3</td>
</tr>
<tr>
<td>Monument</td>
<td>2</td>
</tr>
<tr>
<td>Gardens</td>
<td>2</td>
</tr>
<tr>
<td>Gallery</td>
<td>2</td>
</tr>
<tr>
<td>Charity work</td>
<td>2</td>
</tr>
<tr>
<td>Woodland management</td>
<td>1</td>
</tr>
<tr>
<td>Theatre</td>
<td>1</td>
</tr>
<tr>
<td>State ceremonial</td>
<td>1</td>
</tr>
<tr>
<td>Retreat</td>
<td>1</td>
</tr>
<tr>
<td>Maintenance of records of arms</td>
<td>1</td>
</tr>
<tr>
<td>Horticultural nursery</td>
<td>1</td>
</tr>
<tr>
<td>Historical research</td>
<td>1</td>
</tr>
<tr>
<td>Historical arts</td>
<td>1</td>
</tr>
<tr>
<td>Garden centre</td>
<td>1</td>
</tr>
<tr>
<td>Family home</td>
<td>1</td>
</tr>
<tr>
<td>Environmental research</td>
<td>1</td>
</tr>
<tr>
<td>Conference centre</td>
<td>1</td>
</tr>
<tr>
<td>Concerts</td>
<td>1</td>
</tr>
<tr>
<td>Community work</td>
<td>1</td>
</tr>
<tr>
<td>Collection management</td>
<td>1</td>
</tr>
</tbody>
</table>

*Table 5.2 “Other” activities at historic houses in ranked order*
The literature as discussed in 2.4.2 indicates that there is a large degree of recreational activities at historic houses ranging from antiques fairs, though Easter egg hunts to horse trials. There is a huge variety of events available for the public, much of which can be construed as leisure activities.

As an extension of the corporate hospitality activities many properties are able to act as venues for weddings. During the interviews with property managers, one revealed that:

“We’ve got a wedding plan for next year, people get married here, we’ve got several ceremonies.”39

The individual further revealed that they had 3 weddings and 1 reception in a row indicating how popular it was to have a historic house as the backdrop to a planned event. This has only been made possible recently by a change in the law, but it is making the nation’s heritage available to other groups of people, who may not have used it previously.

One aspect of activities that has not been mentioned by the historic houses that were surveyed and/or interviewed, and which has been an increasing source of revenue for some properties has been that of hiring out the property as a film set. According to Alberge:

“Filming raises five and six figure sums for the local economy and the properties themselves.” (Alberge 2005, p.29)

This article looked at a number of National Trust properties that have raised income via this means. They are not the only ones however; other properties have equally been used such as Prideaux Place in Cornwall, which has actually retained the features added by the filmmakers. There is a further benefit to historic houses after filming has

finished. The very fact that they have been used as a film set often acts as a magnet for visitors and the numbers rise in the aftermath of a film’s release. Basildon Park, run by the National Trust normally receives 1,300 visitors a week in September, but after it featured in a movie adaptation of *Pride and Prejudice*, Alberge reports that:

“The film has inspired a further 3,000 people to visit in the past few days alone” (Alberge 2005, p.29).

This gives an indication of the benefits of more diverse methods of ensuring the upkeep of the historic fabric.

In section 2.4.3 Butler investigated the work of historic country houses from a financial standpoint and stated that leisure activities were used as a means of creating revenue and drawing the public to use the house. However he did differentiate between installed or fixed attractions and events. He has also noted that there was a wide variety of house activities, some of which can be seen to have a high educational value.

One property manger indicated that they looked after:

“The adventure playground and farmyard that comes under my remit.”

This corroborates the statements made by Butler as these are installed facilities by the current owners. It has helped to make the property attractive to a more diverse clientele and consequently made the property more successful.

The discussion in the literature and the results of the survey provides a view of recreation and education at historic houses which at times does seem contradictory, but as has been noted, it is a blurring of the boundaries between recreation and leisure, much of which has come from the belief that through enjoyment comes learning.

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5.2 Small Businesses

In 4.3 comparisons were made with small businesses and gave some indication that there were a number of similarities between them and historic houses. One property actually stated:

“There is COSHH, housekeeping, conservation, health and safety manuals, the security manual ….. the fire manual….. Then there’s accounts, disability, budget holder.”

This indicates the diversity of their activities, but also that there are many activities that compare with those at small businesses.

Despite the similarities one of the key differences has been noted by Williams and Bradlaw, which is that unlike a small business where in the absence of a member of staff the owner may step in to fill the breach,

“This scenario is difficult, if not impossible with the country house” (Williams and Bradlaw 2001, p.285).

The diversity found at historic houses largely prohibits this, for example a gardener will not cook a banquet, and therefore the demands on the establishment are different. This argument also indicates, along with the survey data that portrays many activities, that each historic house is unique and has unique needs.

5.3 Heritage Organization Influence

41 Interviewee G, 24th March 2004
The diversity of activities at historic houses can be seen in many different ways, from the survey data, the literature and the interviews. What is not clear from this information is the involvement of parent organizations, such as English heritage and the National Trust.

One custodian working under the auspices of a heritage organization stated that for catering activities:

“That’s managed by another department.”

They also stated:

“We have an event department that set up any events that we are going to be running that year”.

This shows some of the diversity of activities that are carried out, but also the fact that they have a wider pool of experts to draw upon to enable them to carry out these activities. This would introduce inequity in the sector as independent properties would not have this additional support, they would need to provide their own.

### 5.4 Conclusions

It is clear that despite the similarities identified in chapter 4 historic houses have a much wider range of activities than a small business might expect to be involved with. Even if the focus of the SME is taken into account, for example a manufacturing firm or architectural consultancy, the level and range of activities that historic houses might have to engage with is more considerable and more diverse.

The main focus of activities at historic houses is that of conservation and all activities are directed at ensuring that the historic fabric of the building and its contents is

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42 Interviewee D, 2nd December 2003.
maintained. The main fact that emphasises this focus is that the properties from the survey gave visitor management a weighting equivalent to that of conservation. This is because maintaining the property depends on controlling access for visitors to minimise damages to the fabric of the buildings.

Historic houses are looking for continuously looking for new ways to promote the property and encourage visitors, examples of which are the fact that as soon as wedding licences could be granted at properties then they immediately promoted them, as well as providing receptions. In addition establishments have welcomed filmmakers to their properties as an added activity. The research revealed 30 other activities, yet the literature reveals even more, showing the breadth and diversity of activities that take place at historic houses.

Properties continue to offer a wide range of countryside activities to the public, such as walking, riding and fishing. These provide the nation with many weekend activities, often at no cost, making them a valuable national asset that is not supported by anyone other than themselves.

There is a blurring of the boundaries between educational activities and recreational activities. Historic houses have stated the importance of education to their mission through the literature and through the high number of responses in the survey. Using recreation for education has helped to blur the boundaries for properties. Education is an important means of linking properties to educational studies, but is unclear how resources made available by some organisations is related or can be made available at properties.

Heritage organisations have an impact on the activities of establishments, as they can help to provide activities at a number of properties through the use of a central department to spread the workload.
Chapter 6

Information provision in historic houses

Major establishments and institutions have access to their own library and/or internal information service that will provide them with the requisite information, enabling them to deliver their service or product. Historic houses, like SMEs, do not always have access to this type of organised provision of information. Additionally the size of some establishments can inhibit their best attempts to supply information to all staff, whether they are operating on larger or smaller scales. This lack of support for their operational activities will affect the way in which they deliver their service and the additional methods and effort required to secure their aims.

To ascertain how “rich” or “poor” historic houses are in their access to information and additionally whether it serves their needs or not, the questionnaire survey and interviews at historic houses probed their activities and methods with respect to the use of information to deliver their service to the public.

6.1 Access to library and/or information provision

Of the 201 respondents to the questionnaire survey 135 were members of organisations that provided them with either a library and/or information service. This accounts for 67.2% of the population surveyed and is an encouraging result, especially when only 42.8% of establishments were members of either the National Trust, English Heritage or equivalent regional body. It indicates that bodies such as the Historic Houses Association, which represent the interests of private owners, are providing some form of service to their members. The literature does not suggest that library and/or
information work is being undertaken by membership organisations aimed at supporting historic houses in their activities. Properties seem to believe that they have access to an information service of some description. Establishments were asked to provide details on this service and 90 answers were received. Overwhelmingly, the responses indicated that English Heritage (N=15), The National Trust (N=22), or the Historic Houses Association (N=27), provided them with some form of information service. However the responses for these membership organisations did not reveal whether this information service included a library. Those organisations that quoted that their information support came from local authorities (9 responses), also indicated that library support was available to them.

One interviewee quoted that:

“There is definitely a records place at Fort Cumberland and in Swindon, probably in London. We have got a library.”43

There is some confusion here as the London records are now located at Swindon, but those at properties are not aware of this. Fort Cumberland is the centre for much of English Heritage’s archaeological research activities. The fact that they are vaguely aware of what is available through their parent organisation indicates that there is a problem and shows that they rarely, if at all, make use of the facilities. Of the properties interviewed this was the only one that indicated access to a library from a parent or membership organisation. This does not sit comfortably with the data collated from the questionnaire survey which indicated that two thirds of the sample population believed they had access to an information service. However a number of comments from the other interviewed sites indicated that they used membership organisations, such as the HHA or English Heritage, as an information service and would consider this as access to a service in one form or another.

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43 Interviewee D, 2nd December 2003.
When asked about a particular piece of information that had been required for an establishment the owner stated:

“Someone like Norman Hudson or the Historic Houses Association have a help line.”

This gives support to the data collected in the questionnaire survey, which showed that more properties used membership organisations as information services than actually indicated that they belonged to them. This quote indicates that some do make use of these services.

### 6.2 Access to specialist information

Establishments were asked, via the questionnaire survey, if they had access to specialist information. The response was high, with 144 reporting that they had such access. Specialist information that was mentioned by respondents included information on taxation, preservation techniques and other aspects of heritage work. Further to this, respondents were asked to give details of who provided this specialist support. There were 67 different responses to this question and in addition a number of organisations were quoted on more than one occasion. The full range of sources reported by historic houses is laid out in Table 6.0. Due to the exceptionally high number of agencies reported for specialist information the table has been split into two halves with the most often quoted sources of specialist information appearing on the left hand side with decreasing totals for the least requested appearing on the right hand side.

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44 Interviewee A, 2\textsuperscript{nd} March 2004.
<table>
<thead>
<tr>
<th>Organisation</th>
<th>Number of responses</th>
<th>Organisation</th>
<th>Number of responses</th>
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<tr>
<td>English Heritage (EH)</td>
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<td>Regional Museum Body</td>
<td>12</td>
<td>Heritage consultants</td>
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<td>Local Council</td>
<td>12</td>
<td>HM Prison Service</td>
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<tr>
<td>Museum Service</td>
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<td>Inland revenue</td>
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<tr>
<td>Historic Houses Association</td>
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<td>IRPC: group of Croner consulting (legal)</td>
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<tr>
<td>External Consultants</td>
<td>7</td>
<td>Irving Society</td>
<td>1</td>
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<tr>
<td>Country Landowners Association</td>
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<td>Kew Bridge Steam museum</td>
<td>1</td>
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<tr>
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<td>National Galleries of Scotland</td>
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<td>Tourist Board</td>
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<td>3</td>
<td>Public Records Office</td>
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<tr>
<td>Resource</td>
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<td>Rare Breeds Group</td>
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<td></td>
<td>Northern Ireland</td>
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<td>National Farmers Union</td>
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<td>Royal Institute for British Architects</td>
<td>1</td>
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<tr>
<td>National Trust for Scotland</td>
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<td>RISA?</td>
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<tr>
<td>Royal Horticultural Society</td>
<td>2</td>
<td>Science Museum</td>
<td>1</td>
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<tr>
<td>Royal Institute for Chartered Surveyors</td>
<td>2</td>
<td>Scottish Conservation Bureau advisory panel</td>
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<td>Society for the Protection of Ancient Buildings</td>
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<td>Scottish Museums Council</td>
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<td>Universities</td>
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<td>Society of Antiquaries</td>
<td>1</td>
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<td>South East Arts Council</td>
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<td>Advisory committee (NT, EH, council, tourist</td>
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<td>Specialist architect and accountant</td>
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<td>board etc.)</td>
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<tr>
<td>British Museum</td>
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<td>Specialist libraries</td>
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<td>British Tourist Authority</td>
<td>1</td>
<td>Suffolk Preservation Society</td>
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<td>Central Association of Agricultural Values</td>
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<td>TGA?</td>
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<td>Council for the Protection of Rural England</td>
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<td>Theatre Museum Society</td>
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<td>Diageo head office**</td>
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<td>Timber Farmers UK</td>
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<td>English Nature</td>
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<td>Treasure Houses of England</td>
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<td>Environmental Agency</td>
<td>1</td>
<td>Welsh Assembly</td>
<td>1</td>
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<tr>
<td>Fitzwilliam museum</td>
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<td>West Yorkshire Archaeological Society</td>
<td>1</td>
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<tr>
<td>Folk Life Society</td>
<td>1</td>
<td>Wingfield Arts</td>
<td>1</td>
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<td></td>
<td></td>
<td>Wordsworth Trust</td>
<td>1</td>
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</tbody>
</table>

*Gayer-Anderson House is an egyptological institution; ** Diageo owns the Guinness brands; ? Unable to verify these providers

Table 6.0 Providers of specialist information to establishments in ranked order
The National Trust was quoted on 35 occasions as being a source of specialist information. This was not restricted to National Trust properties and also included establishments physically based in other regions, such as Scotland, although it should be noted that properties in Scotland may have meant the National Trust for Scotland even if they only wrote National Trust. It can be speculated that the Trust is willing to provide help to preserve the historic fabric of the country as an overarching mission whether it is to their own properties or others. Other organisations used as a source of specialist information were English Heritage and the Historic Houses Association with 12 and 9 responses respectively. This provides a view on the three foremost heritage organisations which provide the backbone of specialist information support to historic houses operating in the UK. What is not clear is the implication for each property, and whether there are cost implications for using this service. Neither is it clear what the impact is on these organisations, and whether it is a drain on their resources or something that is seen as part of their mission.

These organisations do not provide the only points of service to historic houses. The responses also showed that there was a heavy reliance on local sources. These ranged from local councils (N=12), through local tourism fora (N=12), to local heritage trusts and contacts (N=5). Additionally local museum services (N=11) and regional museums bodies (N=12) give considerable support to properties in their locality. This is consistent with earlier responses that listed local bodies as important to historic houses. The literature review indicated that many properties are private homes and are also local employers having a significant impact on their community. Garrod and Fyall demonstrated through the use of the Delphi technique that those involved in the running of heritage attractions named the local community as a key element of their mission (Garrod and Fyall 2000). It is apparent therefore that they will not only be an intrinsic part of that community, but that they will also be more aware of local sources and would, in any case, be more inclined to use them as it is supporting the local culture and community.
Community is an easy word to use but it is not so easy to define. Here it has been used to an ostensibly “local” grouping, where the historic house has been, possibly over a number of generations central to the local economy and possibly village. The changed environment that they now operate in means that activities are now different even if they are still firmly embedded as a part of the local community. The literature suggests that communities has multiple meanings and the term “interpretive communities is used”. Watson quotes Mason who suggests six ways of defining communities, these being by shared historical or cultural experiences; specialist knowledge; demographic/socio-economic factors; identities (regional, national, local or relating to sex, gender, disability or age); visiting practices; exclusion from other groups) (Watson 2007, p. 4-8). As noted above the research is talking about the community which is geographically local, but can also be driven by socio-economic factors such as a dependence on the property for employment in the area or through shared cultural experiences that have taken place over a period of time. What we see is that community can mean more than one thing but it can be noted that historic houses are connected to their local environment. Crooke says that “‘A good sense of community’ is thought to be of benefit by building positive relations and useful networks that lead to social and economic advantage” (Crooke 2008, p.417). The impression given by the connections of historic houses with organisations such as local museums as noted above seems to echo this comment. Peers and Brown tell their readers that “artefacts in museums embody both the local knowledge and histories that produced them” (Peers and Brown 2007, p.523) which seems apt in light of figures given above regarding local reliance on museums by properties. Historic houses are part of local history, (and sometimes national), and museums will be both a supporter and collaborator in protecting that heritage.

One individual at an establishment commented on marketing in the locality stating that it was:
“Something that we are really proactive on but we try and do it on the cheap so we don’t buy in unless we’re forced to. We don’t buy advertising, we do all our leaflet distribution in-house and our best form of marketing is the Duchess.”  

Considering the size and reputation of the property it might be expected that they would employ a marketing company, but they do not. They keep their marketing local and concentrate on providing free access to the estate for walking to the public.

Interestingly the Country Landowners Association received 6 responses. Some historic houses have considerable estates that require managing according to the law; and support from other landowners to share problems and information is welcome. As already indicated in 5.14 some establishments perform different activities, which may include aspects of land management. Those properties that have considerable issues regarding farming and land management may seek advice from similar peer groups. Numerous other sources quoted ranged from English Nature to the Theatre Museum Society. Chapter 5 discussed the diversity of activities undertaken at historic houses and many of these are exceedingly specialized, including such examples as the Lawnmower Museum at Treliske in Cornwall. It is therefore expected that they would consult with specialist organisations, such as local or regional museum bodies that might help them in servicing the needs of their property.

6.3 Information handling

The questionnaire survey could not provide specific data as to how information is handled at historic houses. This could only be achieved through interviewing the historic houses on site and based on this number of interviews some insight into how those running historic houses attempted to handle the information at their disposal can be gleaned.

One owner commented:

“It is very much relying on me to organise it, so if anything happens to me, goodness knows what’s happening.”

This indicates that in some establishments much of the information regarding the establishment is held within the hands, or more appropriately the head, of one person. The same person went on to say:

“I’ve got a small back up team, but they couldn’t last too long. Mostly they come to me, my secretary knows most things […], but she doesn’t know if something goes wrong.”

It can be seen here that they do have support, but that they do not spread the knowledge to other members of staff. Others involved in day to day activities can still continue in their absence, but this would be limited and if anything untoward was to happen the property would suffer considerably. This may seem unusual, but there are two reasons as to why an individual would keep the running of the property to themselves. Firstly they would feel that they have a duty to preserve the property for future generations to enjoy. Secondly they rely heavily on a volunteer workforce. One volunteer was quoted as saying:

“In my 84th year I fear that my brain isn’t as reliable as it was.”

It is not unknown for those visiting historic houses to find that many of those on hand to help visitors are no longer young. Some have spare time as they may be retired and choose to spend it helping at historic houses. However this ensures that the property managers keep most of the details regarding the running of the property to themselves as volunteers may either move on after a short space of time or not necessarily have the

46 Interviewee B, 7th February 2004.
47 Ibid.
48 Ibid.
faculties needed for some aspects of work at the property. This is echoed by an owner’s comment that:

“If it was something ordinary they could probably find it, but if it was something out of the ordinary it might be more difficult.”

These comments are made by smaller properties who have limited resources at their disposal and they are more reliant on help that is cost free or requires less cost.

However, their does exist a difference between smaller and larger properties, which is made apparent by the quotes that have been collated.

“The most difficult aspect of information on an estate like Chatsworth is keeping everyone informed on what’s going on”.

When the property operates on a much larger scale the handling of information has to be spread across the operation. The difficulty is no longer similar to that of a smaller property, where the owner may be the hub and holder of all information regarding the property; the problem becomes that of conveying a much larger body of information to a larger and more disparate group. This is often enabled through the use of staff meetings on a monthly basis at the property above. Despite this the establishment still finds that not all staff appreciates being informed:

“Some do (appreciate it) and some run a mile.”

This is always going to be the case where the provision of information is concerned in the workplace. Some staff like to be informed and involved in the development of the business; others prefer the status quo and are wary of information and the fact that it may bring change or something else unexpected.

49 Interviewee B, 7th February 2004.
51 Ibid.
It is not only large properties that need to handle information for their staff and, as discussed in 6.4, for their visitors. One custodian stated:

“We have started a new initiative, we are having team briefings.”\(^{52}\)

And

“We are a very small property, there is only me and the gardener who are full-time staff, there is the part-time cleaner and the part-time assistant custodian.”\(^{53}\)

Even if a property is small they may have meetings to share information, although it is acknowledge by the historic house just quoted that being small means less meetings as you meet everybody most of the time. They also said:

“Some properties you may find twenty staff and some people in the gardens or wardens on the estate may not get to meet anybody else.”\(^{54}\)

The merits of sharing information with staff are known to historic houses, yet they will look for an informal approach unless the size of activities requires more formal methods. The sharing or passing on of information is limited and precedents ion the cultural heritage sector for information management standards do exist and if supported could be adopted. The Collections Trust offers proformas and help for standards to mange museums information in the form of *Spectrum* and this could be used more widely or even adapted for historic houses and their collections (Collections Trust n.d.).

\(^{52}\) Interviewee G, 24\(^{th}\) March 2004.

\(^{53}\) Ibid.

\(^{54}\) Ibid.
6.4 Provision of information for visitors

In chapter four the importance of marketing to historic houses was discussed. Figure 4.2 provides a view on the main aspects of the work performed by those who are managing historic houses. Marketing and customer relations were clearly the most important aspects of their roles, indicating the importance placed on informing those who visit properties. This is always balanced with the needs of maintaining the historic fabric, again discussed in chapter four.

Despite the importance of this activity according to the questionnaire survey to the property, the relative understanding of the concept and operation seems in doubt when comments from the interviews are considered.

One owner was asked whether the house had any products used for the purpose of marketing and they replied:

“I don’t know what that means.”

When this was explained to them they then elaborated, stating:

“I have postcards, a brochure, and a garden plan and sort of information about the house.”

Clearly the owner of this property placed little emphasis on marketing as such; they were more interested in maintaining the property for future generations. They do understand the need for advertising indicated by the comment:

“I’m on quite a lot of websites and I have a little flyer.”

56 Ibid.
57 Ibid.
However the more striking comment made by the same individual is:

“I think I visualise it turning over quite happily until my son comes along and then he will probably run things quite differently.”\(^{58}\)

This confirms the point made previously about the drive to maintain the property for future generations rather than developing the property.

However, the picture is different when larger properties i.e., those visited by more people are considered. The Comptroller at one of the most frequently visited properties in the United Kingdom had a different view on marketing:

“What something that we are really proactive on but we try and do it on the cheap so we don’t buy in unless we’re forced to. We don’t buy advertising, we do all our leaflet distribution in-house and our best form of marketing is the Duchess.”\(^{59}\)

The approach taken here is one of a more active involvement in the activity. In fact they take such care with their property’s image that they keep the activity in-house and use their own unique selling points, (including the property owner). The activities that take place at the same property are more diverse than at a smaller property and this will influence both the development of the property and the need for marketing.

Larger properties that have extensive marketing provided by their parent organisation have a distinct advantage. Leaflets that advertise the property along with others help to bring visitors to the door. However, those working at one such property stated:

“It would be nice to produce something ourselves so that we could tell the public what’s going on and we just haven’t got the time to do this.”\(^{60}\)

\(^{58}\) Interviewee B, 7th February 2004.
\(^{59}\) Interviewee C, 6th January 2004.
\(^{60}\) Interviewee D, 2nd December 2003.
This leads to the conclusion that they feel that they do not provide enough information to engage visitors sufficiently when they are there. As with any business the problem is clearly stated: there is not sufficient time to do this.

Historic houses that are supported by the local authority can operate as a smaller property. However, they do have support from different sections of the local authority, as discussed in section 7.1, which gives them an advantage over other properties. Despite this they are subject to budget restrictions which often affects cultural and heritage aspects of the authority in the first instance. One property said:

“(A colleague) and myself and the museums assistants all work together to co-ordinate information to each other and also getting info out to the public.”\textsuperscript{61}

The small team work closely together as other historic houses do, as discussed in 6.3, to share information with each other, but also to disseminate information to the public. As far as management of information is concerned this is in some respects organised compared to activities at other historic houses, but it should be noted that the professional support afforded to them is a distinct advantage.

Smaller properties do operate in a different environment to properties with a larger visitor footfall. Opening for visitors takes place on a more “ad hoc” basis and is often combined with the normal running of the property. One owner said:

“You end up with a post it note on the back door saying back in 10 minutes – school run.”\textsuperscript{62}

Priorities are often very different at smaller properties and this encapsulates the sentiments that the running of the property revolves around the family and building for future generations, as has been discussed in 4.1 in an earlier chapter.

\textsuperscript{61} Interviewee F, 24\textsuperscript{th} November 2003.
\textsuperscript{62} Interviewee A, 2\textsuperscript{nd} March 2004.
6.5 Personal use of information

How do the managers of historic houses actually make use of information for themselves? What do they do when they need to deal with a problem and have to make a decision with regard to solving that problem? The model suggested in section 3.2 suggested that trusted sources were of importance to those managing historic houses rather than any formal sources that might be available. Tacit knowledge held within the individual that has been garnered by the individual from past generations and from their own experiences will guide them in their information seeking behaviour. Their experiences will lead them to make decisions in the best interests of their property. When information is required that they do not hold within their own tacit knowledge then they will go to a trusted source that they believe holds the answer for them.

The responses received from those interviewed do give an impression of the process they undertake when they are required to find something out for themselves to aid their decision making process. One owner said:

“Over the years I have had to find out for myself.”\textsuperscript{63}

This gives some indication that they rely on their own best efforts and internal systems of knowledge when undertaking activities at their property. This does not just apply to small historic houses; it applies to those that operate on a much larger scale. One member of staff at a property that sees a much larger number of visitors during the year reported:

“We rely on experience; really the guidelines are laid down by the Duke and Duchess.”\textsuperscript{64}

\textsuperscript{63} Interviewee B, 7\textsuperscript{th} February 2004.
\textsuperscript{64} Interviewee C, 6\textsuperscript{th} January 2004.
This is not unusual at historic houses, owners and managers are often a source of much information about the property, its history and its activities. One owner was quoted as saying:

“There is so much in my head I really should get it organised.”\textsuperscript{65}

These previous two quotes show where the driving force at these historic houses come from. This trend even occurs at those properties that have the support of membership organisations, with them being quoted as saying:

“We have a list by the phone who deals with what, but it’s more in your brain, if you’ve got an emergency you know where to go.”\textsuperscript{66}

There is a reliance on the memory of the individual in charge of the property, much of which is not written down, but which may be passed down either through the family or other means. Reliance on their own internal networks is a feature of information use at historic houses.

When the activity they undertake requires particular expertise and if they are already aware of where to go for that expertise then their problem is solved. If not then they go to known contacts to get what they need; one stated:

“Needs someone special, but again its word of mouth and asking around.”\textsuperscript{67}

This was confirmed by other owners who also said that to solve a problem they would be:

“Speaking to friends”\textsuperscript{68} and “we try to keep a good address book of tradesmen and services.”\textsuperscript{69}

\textsuperscript{65} Interviewee B, 7\textsuperscript{th} February 2004.
\textsuperscript{66} Interviewee D, 2\textsuperscript{nd} December 2003.
\textsuperscript{67} Interviewee B, 7\textsuperscript{th} February 2004.
A pattern begins to emerge here, owners refer to their own internal knowledge, which is tried and tested, to solve problems and then speak to those either in a similar position that may have the information that they need. As a result they may record this for themselves as indicated in the quote above where they keep a good address book. Another site (Little Malvern Court) used a rolodex to store the same information. Traditional sources are not therefore the first place that they would go should they require particular expertise. In fact one owner states:

“It’s not the sort of thing you can go to the Yellow Pages for because it’s fairly specialised.”70

Having rejected a more traditional method of information seeking that might be applied to library users a property manager would then use alternative methods. They would then speak to others that they know to see if they might know the answer to their query. This is further enhanced by the comment:

“Or you know someone […] so you ring them up and ask how did you do that?”71

Curiously this is not uncommon in establishments that have a supportive parent organisation. A property manager told the interviewer:

“Depending on the level of information required phoning the right person.”72

Other sources are more readily available to this group of properties, yet the preferred option is to phone the right person depending on their needs. This could take more than one call, yet it is the route chosen rather than accessing readily available information.

69 Ibid.
70 Interviewee B, 7th February 2004.
71 Ibid.
72 Interviewee D, 2nd December 2003.
There is an obvious preference here for sources close to home that have proven to be useful in the past. Comments made by those interviewed provides a reason for this.

“We are always getting stuff in the post from people.”\(^{73}\)

Owners are receiving a lot of information and are overloaded with the amount. One interviewee told the interviewer:

“Too much (information) sometimes. You have to filter it all. If I’m addled with it all I go to Strutt and Parker who weed it out and they have obviously got special people working on it.”\(^{74}\)

In this latter case the owner has a preferred source which they consult when they cannot cope with the information that is being presented to them. When this occurs they go others in a similar position or to known sources that have been involved with their family for a considerable period of time, sometimes for generations.

Staff at a larger property also confirmed the point that sources of information that have been known to the property for generations are highly valued:

“The (late) Duke’s lawyers are a mine of information. We are in constant contact with them, hardly a week goes by.”\(^{75}\)

Consequently they may be preferred over other sources. Another owner confirmed the difficulty of too much information:

“We are inundated with information, just need to sift through it, it takes time, and you can easily miss something that you should have picked up.”\(^{76}\)

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\(^{73}\) Interviewee B, 7\(^{th}\) February 2004.  
\(^{74}\) Ibid.  
\(^{75}\) Interviewee C, 6\(^{th}\) January 2004.  
\(^{76}\) Interviewee A, 2\(^{nd}\) March 2004.
It is important to note that it does concern them that they might have missed something, but their circumstances are such that despite this they do not wholly see the value of information. A curious comment made by the same owner raises an interesting notion regarding the value of information to those that manage historic houses.

“You’re not really interested in the information as such, you’re interested in getting the job done and the information aspect has to be got through.”77

Information is not seen as something that solves problems for the managers, it is seen as a barrier to getting the job completed. It has to be ‘got through’ so that the problem is solved, rather than being seen as a conduit to solving the problem. The reliance of owners and managers properties on their own tacit knowledge is a reflection of the perception that they have of information as a barrier. It is an obstacle if they have to make efforts to use it. Consequently they rely on the methods that have served those that served before and on their own experiences. This is management by using knowledge rather than information. However knowledge can be increased if the support is available to expand individual’s use of information resources until that is also part of their tacit knowledge.

6.6 Information storage at historic houses

Historic houses, like any business, must use a level of information. This information must be adequately stored, whether for legal reasons (for example confidential staff records) or for practical reasons, it might be stored on-site or at another location. The survey revealed that 81 establishments claimed to have their own library on-site where information pertaining to the historic house is kept. However the true picture is not exactly as this suggests.

The issue revolves around how establishments define a ‘library’, and how that library functions. Many properties boast a library whose contents have been collected over a period of time. Consequently they may be of considerable antiquarian value. This does not, however, represent a working library that supports current management activity of the kind that is of primary interest in this study. In the light of comments in the previous section it is notable that most managers prefer to contact another person to solve their problems, not refer to a library, whether theirs or any other.

Of the sample 81 respondents indicated that there was actually a library on-site. Many of these will be antiquarian heritage libraries that have their own function and value in heritage management. It is interesting to note that: “The organization which probably has in its care the largest number of historic libraries in the country is the National Trust” (Quarmby Lawrence 2003, p.39-54). The Trust is systematically trying to record these and make this information available as it is an untapped and unknown resource. Purcell notes that: “There seem to be about 250,000 titles, of which all but 50,000 actually belong to the Trust,” and that “the great majority of books genuinely belong in their houses” (Purcell 2005, p.54). There remains a lot to do before there is sufficient information on the extent of the Trust’s libraries although Purcell gives some idea of the gems that they contain (Purcell 2005), but there will be many that remain hidden. It is important to note that these libraries are of considerable importance to scholars and researchers should good catalogue records become available, but on the whole they are not working collections and would not support historic houses with their day to day activities.

English Heritage have not yet made the same leap of faith and although aware of historic libraries, do not yet see them as sufficiently important, due to the ‘at risk’ nature of many of their other buildings. However Quarmby Lawrence notes that they are still willing to support any external surveys of libraries and incorporate data into the National Monuments Record (Quarmby Lawrence 2003).
They may play a considerable part in research and education if the property is engaged in these activities. For example a folio of work by Capability Brown would be of interest to researchers, but also to visiting parties of schoolchildren. These collections must also be subject to conservation and restoration.

Thus, the mere presence of a library does not ensure good use of information. A working information resource would provide the requisite materials to enable the effective running of the establishment. One interviewee at a larger property stated:

“In practical terms I would say that we refer to 10% of our library on a regular basis. It is a working library in that regard.”

The size of the library at this property is considerable and is very valuable in heritage terms. The fact that it is used at all is intriguing; the fact that ten per cent is used regularly indicates that activities noted above such as education and research have a role in the property’s operations.

Many properties have historical libraries and much of the collection, possibly 90% or more is unused. This means that libraries that are available to historic houses do not necessarily provide an information resource for those working at the property. They do have historical value and are valuable for research purposes if their contents are known and made available to others, but this is a considerable task to be undertaken and would require financial support to enable this to happen. The sector already suffers from funding difficulties so although some collections may be catalogued; there are others that will remain hidden gems.

The information they keep on site needs to be stored and maintained. The questionnaire asked properties how this information is stored. Many establishments store information at numerous locations across their site(s). Replies showed that 101 properties used a number of locations on-site to store their information. This figure may or may not

include the library already mentioned above and could be a contributor to poor use of information. Inability to access information whether it is because it is poorly catalogued or classified or because it is remotely located will also affect its use.

One interviewee had an office the size of an under stairs cupboard where they kept their information. They stated:

“In the office these are the things we look at regularly, we have archives which are in another cupboard.”

The area given over to the storage of information is not very large and it must be difficult to access when the space available is extremely limited. Historic houses do consistently have an office where they keep information used regularly. Another person stated:

“We’ve got an estate office, majority of it is kept there and archives.”

Apart from the use of an office to store information the sites above also indicate the presence of archives on site, but in a different location. It is repeated that establishments have a limited amount of space for storage for these, and as a result, they will not be consulted as often as they might.

6.7 Accessibility of information

When visited for interviewing, properties had little room to store information and at best had the occasional filing cabinet in their work area and/or some shelving to store some select items that they used.

79 Interviewee D, 2nd December 2003.
How is this information being kept and how much is it related to modern methods of information management and storage? Commonly, people stated:

“We still use paper for storage”. 81

Paper is the material of choice at historic houses, even those that have managed to adapt to technologies, such as the Internet, they are still saying:

“English Heritage are still very attached to paper – masses, we do electronic and paper things every day” 82 and “We are now using a lot of paper because we are printing out things that are coming in by email.” 83

Interviewees at historic houses also quoted that they were:

“Currently updating all or a lot of our manuals” 84 and “Most technical information would get from the manuals we keep at the property.” 85

It is encouraging to see that resources are being made available to properties, yet there is an obvious need to control the amount and flow of information. Comment has already been made in 6.5 that there is an abundance of information that managers cannot get through without help from another source. This would explain why many choose to speak to another person.

This does not however apply to all establishments. One interviewee had worked at a number of properties belonging to one membership organisation. They reported that the availability of information at each property was unequal. They stated:

81 Ibid.
82 Interviewee D, 2nd December 2003.
83 Interviewee G, 24th March 2004
84 Interviewee D, 2nd December 2003.
85 Interviewee G, 24th March 2004
“We’re one of the top 25 sites […], so we tend to find the top sites get information given to them. The poor little sites only open at the weekend don’t tend to have much available to them.”

When quoting their experience at smaller sites they said that activity was:

“A bit disconnected and a bit behind things when everyone else is putting things on email you’ve got to wait for snail mail” and “I have worked at sites where there has not been an internet connection.”

Access to the Internet and its use does have a bearing on how properties view information. When asked about their use of the Internet one owner said:

“I haven’t learnt to use it yet.”

While another manager stated:

“Personally virtually none. If I want different information from the Net then I would ask somebody to trawl around.”

To complete this picture, an owner from Scotland also said, more tellingly in their case:

“I haven’t got to grips with the old internet. I want to know how to do it but not necessarily do it. I see people spending hours getting into knots on the computer and I’m quite wary of it.”

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86 Interviewee D, 2nd December 2003.
87 Interviewee D, 2nd December 2003.
88 Ibid.
89 Interviewee B, 7th February 2004.
There is a reluctance to embrace new technologies at some historic houses and use them to improve their access to information. In one sense their fear is valid, as access to the Internet is only a first step. Consequent steps require that the user be familiar with good search and retrieval skills to get the most benefit from the information available.

Properties do not always have access to the internet due to their remote location and this results in a delay for any form of information transfer. Additionally staff can feel cut off from both an organisational and geographical viewpoint.

6.8 Role of membership organisations

Membership organisations play an important part in storing information relevant to the activities taking place at historic houses. This is indicated by 85 properties that were surveyed stating that information used in the running of the establishment is held at the membership organisation to which they belong. This is important point to note because it offers scope for sharing knowledge; information on activities at one property may be available to others and could inform good practice at other historic houses. Despite this some interviewees at properties with a parent organization stated:

“If we want to we can request it and they (the library) send something out”92 and “We do have a lot of information and we do use it well, but I think we could use it better if we had time to go through all the information – it is overload sometimes.”93

Although the support is there and access to library facilities is available, the amount of information that is being processed by establishments is notable. This is often done with a limited number of staff and can lead to something being missed. One custodian said:

92 Interviewee D, 2nd December 2003.
93 Ibid.
“There has been a lot of complaints throughout the (organisation) about how you only get the information if you happen to be on the right day.”\textsuperscript{94}

This displays how the information might well be available but it is easy to miss if there is only one method and time of delivery.

Few responses were made to ‘other’ and some of these respondents had selected the organisation of which they were a member and entered it in the other category. The highest scoring location that information was stored other than the categories already mentioned was the Public Record Office\textsuperscript{95} or other archive repository, such as the National Archives of Scotland, which received 10 responses. This was echoed during the interviews at properties where one interviewee said:

“I have dealings with the County Records Office in Worcester, because they have my husband’s family records there.”\textsuperscript{96}

Some properties have little archival information because they do not have the resources or expertise available to them. Generations may pass on a property but the death duties will impose a burden on the next generation so passing the family archives to a public body protects them for posterity. This does not just apply to those that are family owned. One person stated:

“We’ve got a few letters that have been gathered over the years but most of the information is kept at regional office.”\textsuperscript{97}

Historic houses that are part of membership organizations do have to centralize some of their archives to protect them as they cannot have the expertise or the facilities at each property.

\textsuperscript{94} Interviewee G, 24\textsuperscript{th} March 2004

\textsuperscript{95} The Public Record Office has been known as the National Archives since 2003.

\textsuperscript{96} Interviewee B, 7\textsuperscript{th} February 2004.

\textsuperscript{97} Interviewee G, 24\textsuperscript{th} March 2004
Other locations for the storage of information regarding the property included agents, solicitors and tourist information centres. The responses could point to respondents being confused as to whether the question was asking about the storage of historical data regarding the property, rather than information used in day to day activities such as staffing. The importance of local tourist offices was noted by one owner who said at interview:

“I have a little flyer which I take round to all the local tourist offices.”

While both of these are important it would have some bearing on conclusions if establishments were simply describing those organisations they were providing marketing information for to distribute to the public.

6.9 Difficulties encountered when obtaining information

Section 6.5 revealed that owners and managers often resort to speaking to someone they already know to get the information that they require to solve a problem. The same section also noted that property managers had difficulty filtering the information that they were inundated with.

When questioned 81 respondents to the survey indicated that they had had some difficulty accessing information. The most frequent reason, (noted by 47 owners and managers), for not being able to access the information necessary to solve the immediate problem was an inability to locate the precise material they wanted. This echoes the point made in 6.7 regarding access to the Internet and the need to also be apprised of search and retrieval techniques. However, this was not the only problem that was encountered. They also stated that they found:

- Material was inaccessible (N=23);

• Information arrived too late to be of use (N=21);
• Information was too expensive (N=31).

From the data collected via the questionnaire survey regarding difficulties in obtaining information. One difficulty noted was that necessary information is available to properties and that it will cost them. However they are still willing to pay for it. This is evidenced by the earlier responses received on ‘specialist’ information. The responses indicated that establishments did have access to specialist information and often from sources that included solicitors, accountants or similar professional help.

The cost of information is an issue and establishments are generally looking for value for money. There were a number of comments from the property interviews that highlighted the cost of information to them, these being:

“We have to pay for it and write a formal request.”\(^{99}\)

“Have a subscription to your trade organisation ….. And the least you have to pay lawyers and accountants the better.”\(^{100}\)

“I pay Strutt and Parker yearly fees, if they think I’ve been asking too many questions they will put the fee up.”\(^{101}\)

They all indicate different aspects of cost to the property. The latter indicates regular use of a land management firm who deal with many aspects of the property when the owner requests this. The cost does however rise and it is interesting to note that although cost is noted as an issue it is not considered a barrier. The middle quote indicates a dislike for spending the family’s money on firms, indicating that there is not a long term connection with a firm as there is with some properties and their owners. The first quote is the most interesting as it comes from a property belonging to English

\(^{99}\) Interviewee D, 2\(^{nd}\) December 2003.
\(^{100}\) Interviewee A, 2\(^{nd}\) March 2004.
\(^{101}\) Interviewee B, 7\(^{th}\) February 2004.
Heritage, who are still required to pay for information when they request it, even from their own organisation.

It is also clear that information can be difficult for properties to get access to, indicated by the “inaccessibility” and “too late” responses from the questionnaire survey. Owners and managers have chosen to state that some information is inaccessible and they have difficulty getting to the information. This could be due to too much information, creating a barrier that individuals cannot wade their way through. One quote from the interviews can shed some additional light on the situation:

“English Heritage can be darned slow and difficult.”

This statement indicates that when attempting to obtain information some properties experience a below standard service that can make the experience of obtaining information difficult, and in some cases impossible.

Although there were few responses to ‘other’ they give some indication of the difficulties that historic houses have when attempting to find information. Respondents indicated that time to undertake research was a major problem. They already have many other activities for which they are responsible, putting time at a premium. This would be exacerbated by another problem expressed by more than one property, that of too much information being available and not knowing where to go to locate the relevant material.

Two other difficulties expressed by those at historic houses were unexpected, but indicate problems particular to historic houses when using unreliable information. Some respondents indicated that information, even when obtained, is inaccurate. It may be that electronic information has been incorrectly entered into a database, or that it has simply been incorrectly written down. The information could be historical data or a survey of the property. Attention to detail is important for establishments. Historical

102 Interviewee B, 7th February 2004.
interpretation of the property in order to ‘market’ the product to the public is essential and requires accurate data. If the data available to interpreters is inaccurate then this necessitates more time-consuming work to reproduce the correct information. This relates to historically correct data but it applies equally to other aspects of the properties’ activities.

“Sometimes you get information that falls flat on its face because that business stopped trading 2 years ago or it’s quite difficult to get the information – try so and so – and you can never get them.”

This quote emphasises the difficulty with obtaining information by word of mouth, as discussed previously in 6.5. It often depends on the currency of the other property’s information, when their original use of the information could have occurred at a point in time that was considerably earlier. The information could become dated very quickly.

In addition one historic house owner stated:

“It’s trying to narrow it down and because people will not endorse particular outfits and circumstances change.”

They felt that other owners and organisations may not share information as they do not want to be responsible for providing ‘bad’ information, whether it is for a specialist restorer or a plumber.

The uniqueness of each establishment’s history and current activities will mean that to some degree each requires different information to ensure the successful running of their business. They all have different historical backgrounds and priceless collections.

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104 Ibid.
of art requiring access to specialist information, which combined with an inability to find information, would make their work more difficult.

6.10 ‘Non-responses’ and ‘Best endeavours’

One unexpected outcome from the distribution of the questionnaires was that ‘non-responses’ would be received. This was characterised by respondents contacting the researcher to apologise for being unable to complete the form. It was not anticipated that respondents would phone or email to apologise for not replying. In some instances the individuals were convinced by the researcher and the remit of the study that they were of importance to the research and as a consequence more responses were returned.

There were 11 ‘non-responses’ to the survey, where in each case the survey was returned by an establishment with an apology for not completing the survey. The majority of these ‘non-responses’ stated that they did not believe that the survey was relevant to their activities. This does inform the research, because it indicates that historic properties may see no relevance in the appropriate use of information for their activities or in operating as a business. Additional reasons that were given included a lack of time. A final category of ‘non-respondents’ included Government related establishments, such as the Royal Palaces, (but excluding English Heritage), who would not respond. Letters received from these establishments indicated that it is their policy not to respond to any external surveys. This is unfortunate as maintaining some of the oldest and most well known historic houses must require considerable expertise, which could be beneficial to the sector.

Despite the fact that managers of historic houses have indicated they do have difficulties they were asked, through the questionnaire survey, whether they felt that they could successfully run their establishment with the information they have. To ascertain this, managers were asked two questions on whether they had access to enough information to run the business and if the answer to this was negative then they
were asked to explain their reasons for this choice. Of the respondents 136 indicated that they had enough information to run their business. The remaining responses were:

- financing and grant information;
- comparative information on similar sized establishments;
- consumer habits data;
- local information on property and surrounding area;
- legislative information;
- IT training.

Respondents also noted that more analytical information provided by their parent organisation would be welcomed and, as has been already noted above, that more timely delivery of information would benefit them.

The data collected through the interviews at historic houses gave a better idea of how managers at historic houses felt regarding the use of information. The interviews provided some indicative quotes that convey an overarching picture that is representative of the sector. When asked specifically about their needs and whether they were making the best use of the information that was at their disposal the following comments were made:

“We do to a point; we do the best we can at the moment.”\(^{105}\)

“I probably wouldn’t do anything here about providing information because I’m still much more interested in getting the job done, rather than the information that facilitates it.”\(^{106}\)

\(^{105}\) Interviewee C, 6\(^{th}\) January 2004.

\(^{106}\) Interviewee A, 2\(^{nd}\) March 2004.
“We are quite fortunate because we do get a lot of information and it is readily accessible to us, others sites do differ.”\textsuperscript{107}

These indicate that properties operate on a best endeavours policy, rather than from a position of actively using information to its best advantage and planning to make the best use of everything that is made available to them.

\textbf{6.11 Conclusions}

It is notable that despite having benefits at some historic houses, the overall picture of information provision is one of inadequacy. This is not to say that all properties are unaware of the benefits of information, many of them are, they just have little or no time to make the best of it, while they are trying to run the establishment and maintain its historic fabric.

Few properties have a ‘working library’ onsite that provides them with the requisite information to run the property on a daily basis. However many appear to have access to an information service, often from their parent organisation. Additionally there is a bewildering array of specialist information sources that properties consult to obtain information required for the running of activities at the property.

Heritage organisations have a wealth of information that can be made available to properties. This is made available not to just their own properties but to others who request it as well. Despite this, barriers do exist, sometimes through the process of obtaining the information and sometimes through the amount of information that individuals have struggle through before they can find what they need.

One of the difficulties encountered is that one or two individuals at a historic house often retain a large proportion of the information regarding the property. Historic houses are largely passed from generation to generation and each sees itself as the

\textsuperscript{107} Interviewee D, 2\textsuperscript{nd} December 2003.
guardians of the nation’s heritage. This leads to each generation retaining memories of the property, which can be passed down to their descendants. On transferral memories may be lost, but much of it still retains with a limited group of people.

A pattern has emerged during this chapter, owners are referring to their own internal knowledge, which has been tried and tested on previous occasions, to solve problems. If the circumstances are such that their own internal knowledge base is insufficient to cope with the problem, then they speak to those properties that are in a similar position and who may therefore have the information that they require. As a result they may record this information for themselves for use at a later date, but in a limited form, such as a diary or address book.

Time is a major factor at historic houses and owners find it difficult to devote the time necessary to review and manipulate the information they require to support their activities. Information overload is a problem for properties and consequently leads them to turn to other sources to help them overcome their problem.

Historic houses place great value on known sources that have been proven to provide the solution to difficulties that have been experienced in the past. Sources such as the family solicitors or land agents that have been involved with the property for some time are highly valued. These sources usually come at a price and sometimes a considerable one, which in some cases, leads to the reluctance to use them. However many would rather accept that it costs them money then choose to find out the information for themselves, which is the consequence of the many activities undertaken at properties. Other difficulties experienced by properties are inaccessibility and the timely delivery of information. The latter can often take too long to arrive or may not arrive at all leading to a decision making process that is undertaken without the information required to make the best decision. The former can be caused by the process of obtaining the information being too difficult or appearing to be so or in some cases being purely inaccurate.
Some confusion exists in the minds of those running properties as to what information means to them. Establishments feel that they do not provide enough information to engage visitors sufficiently when they are there and do not have sufficient time to improve this situation.

Owners and managers do not see information as a means of supporting the delivery of services at historic houses. Properties do the best they can to cope with the information at their disposal, but information is most often seen as a hurdle that must be overcome, rather than as a vital part of the establishment’s operational activities.
Chapter 7

Improvement in the use of information

The data collected and collated from historic houses was intended to discover the types of information they required in the performance of their job and how that was made available to them. The aim of collecting this information was to see the relative importance of particular formats to historic houses and whether there was any indication that delivery was becoming more focused on electronic methods rather than traditional print based sources or indeed oral sources.

7.1 Types of information required to run the establishment

The questionnaire survey gathered information on the types of material that historic houses were using. High levels of usage were indicated by properties for the types that were defined in the questionnaire indicating the relative importance attached to information and needs to be consistently made available to those working at the property for particular activities.

The property owners and managers were asked in the survey where they locate the different types of material that are used in their work. The survey provided categories for them to choose from. They were asked to state which of the following they used:

- databases;
- paper files;
- published reports.
Additionally they were asked to state whether the resource was available to them by ticking the following appropriate responses:

- local;
- national;
- regional.

Historic houses were able to select as many options as they wished from a matrix of material types and their locations, for example it was possible to select databases provided by local, national and regional sources.

Table 7.0 displays the results of the survey, where the figures indicate that the highest usage of material was for that which was provided locally. Paper based information was the most popular format of material used by establishments with 119 of the sample population selecting this as their preference. This was followed by local databases with 94 properties making this their selection and then published reports (e.g. guidelines) with 84 properties making this selection. These responses were all made regarding locally based resources and does show that historic houses, as was indicated in 6.5, do prefer to stick with known sources that are closer to home.

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<th>Local</th>
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<tr>
<td>Database</td>
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<td>Paper-based files</td>
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<td>61</td>
<td>50</td>
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<tr>
<td>Published reports</td>
<td>84</td>
<td>81</td>
<td>106</td>
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*Table 7.0 Use made of information stored*

The results revealed that information sourced locally is the most widely used, which concurs with some of the earlier findings in 6.2 that indicate that establishments mentioned local organisations either as specialist sources of information or as partners for the exchange of information. As already noted the most popular format at a local
level is paper-based information (N=119). Local information used in day to day operations will be in paper format, for example personnel records or daily job sheets. Conversion to electronic format would require additional staff, or more appropriately trained staff, such as those with more IT related skills. Historic houses already rely heavily on volunteers and may not have ready access to those able to use IT adequately. Across the three categories the figures for local types are higher than those recorded for national and regional sources. The figure for databases at a local level (N=94) was high indicating that there are considerable resources held electronically at a local level by historic houses. It would have been expected to see a higher figure for nationally available databases due to the cost of implementing electronic resources. However it will depend on the database in question and the need it is intending to meet.

Properties run by the local authority use only locally based information sources. When interviewed one property indicated that their local support involved:

- Friends organization to deal with marketing;
- County Record Office for research purposes;
- Education officer who worked for a group of properties/museums;
- Transport from the County Council network;
- Estate inventories managed by the Country Parks and Buildings sections of the County Council;
- Events run by property and archaeological services of the County Council;
- Legal department;
- Personnel section;
- Commercial section responsible for products;
- Franchise for catering.  

Although this list is produced from an interview with a local authority managed historic house, other properties will also have similar needs and will also deal with the local authority. They might have a friends’ organization and will use the Records Office,  

including the deposit of family records as noted in 6.8. They are also using local firms to manage estate inventories as discussed in 6.9.

The exception to the apparent reliance on locally based sources is the use of published reports, which recorded 106 responses at a national level, as opposed to the 84 at the local level. Many establishments are members of the National Trust, English Heritage or other organisations and will have access to manuals, guidelines or other published works that have been made available (even if at a cost) to support historic houses in their work. This leads to the conclusion that the active involvement of organisations has an impact resulting in a higher response rate for this category at the national level. Despite the impact of published reports from national sources it is notable that there is much more reliance on local sources by those managing historic houses. To support this conclusion, statements were made by properties including the three below:

“The easiest thing is our internal telephone directory. It lists the departments, what areas are responsible.”

“All the manuals are now available electronically as are all the forms we need to fill out.”

“Our intranet is quite concise, very organised.”

These are all nationally available resources which are made available both in paper and electronic format, but are manuals of practice used by staff at historic houses in their activities on a daily basis. It confirms the high figure and importance for this category. It should be borne in mind that properties may view locally based information differently to each other. For example the use of manuals by organisations might be seen to be nationally based resources, however the comment:

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110 Ibid.
111 Ibid.
“Most technical information I would get from the manuals we keep at the property.”\textsuperscript{112}

The property may view these as national or locally based resources as may others, especially as most conservation work is managed at a local level. The same person said:

“You don’t have to go to your regional conservator and say you don’t happen to know a local stone conservator.”\textsuperscript{113}

They are independent enough to be able to plan and manage the properties work.

The regional figures are lower across almost all categories than those figures quoted for both the national and local materials. Again there is one exception to this which is the category of paper-based resources from national organisations, which was selected by only 50 properties and is the lowest recorded figure. The fact that it is easier to access information electronically from a nationally available database than to request paper copies that would take time to arrive, (especially in more rural locations), and is often of variable quality due to poor photocopying or other means of reproduction would support the low response received for this category. One interviewee stated:

“It’s pretty good here [...] because of the reliable connection to the Intranet, the post get through and we do get an awful lot of people coming here telling us things.”\textsuperscript{114}

This indicates that there are other properties that do not enjoy this level of access to information because they are in more rural locations and consequently they may rely more on local and/or regional sources of support.

\textsuperscript{112} Interviewee G, 24\textsuperscript{th} March 2004.
\textsuperscript{113} Ibid.
\textsuperscript{114} Interviewee D, 2\textsuperscript{nd} December 2003.
Access to paper resources is easier at a regional level because it may be convenient for
the individual to travel to use them personally, which would account for the slightly
higher number of responses (N=61). One owner stated:

“Scottish Conservation Bureau is a helpful source of information…and they
produce quite a lot of helpful leaflets.”

This would be a regional source that was clearly helpful in their operational activities.

There were few responses to ‘other’ sources, but international databases were quoted as
being used at one establishment, while another quoted the Internet as a source. The
Internet could be considered to be an international resource however it is a rather broad
phrase and without knowing exactly what was being sourced via the Internet it is
difficult to draw any conclusions from the comment other than that further investigation
is required.

### 7.2 Use of information

The questionnaire survey sent out to historic houses asked the respondents to indicate
the different material formats that they use and how often they made use of them. Table
7.1 and figure 7.2 indicates the responses received for each type of format and the
frequency of use of that format when used to access information in day to day
operations. Figure 7.2 compares the percentage value each material format contributes
to the total use of materials across all categories.

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Table 7.1 Frequency of use of different formats for information gathering at historic houses

Table 7.1 indicates that the most frequently used method for the exchange and use of information is email. 143 establishments indicated that this is used on a daily basis, while 17 establishments indicated that they never use it. It should be noted at this point that not all historic houses are connected to the Internet and therefore there would be a number of establishments that would never use email.

Comments made by interviewees at historic houses, noted in section 6.7, supports the fact that some properties, often those in the most rural locations, are not connected to the Internet. This may not be the only reason, for example a small site that is not open very often and has low visitor numbers may not be recognized as important enough to justify the expense of an Internet connection. To confirm this one custodian stated:

“We haven’t got any electronic resources here at all; everything else is picked up by phone.”116

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This property is in a rural location, but still has a connection to the Internet; however the impression conveyed was that the historic house was not wholly part of the information provision process provided by its parent organization, CADW. A subsequent comment:

“I’ve got an email address but they haven’t actually emailed me.”

This almost hints that those running the property are not given enough consideration by their parent organization and can be excluded from current communications. However contact is made by phone and maybe this is seen as a preference as noted by other properties in 6.5.

Although the use of email is high it is important to bear in mind exactly what information is being transmitted through this medium. Emails may be carrying routine requests, such as “ensure doors closed at 6pm” or more complex responses to enquiries on inheritance tax from a specialist information provider.

The interviews held with historic house managers and owners provided some indication of how email is used on a regular basis. One custodian stated when asked what their electronic usage was:

“We do get a fact file sent to us through email; any new policies that have changed in (the organisation); any new guidelines that we need to know.”

This shows that they receive a regular email regarding changes for establishments to consider and additionally, although not quoted here, the same email informs them of changes to their Intranet where they can view the new policies. This is a site run by a heritage organisation and consequently this particular site has considerable support in the provision of information.

118 Interviewee D, 2nd December 2003.
An owner at a much smaller property that does not have the support of a large organisation indicated that:

“We use email quite a bit, the accountant, the lawyer, Strutt and Parker.”

Again this shows the reliance on others and that the use of email has been introduced at the property as a faster and more accessible means of receiving the information that they require form their sources, when they need it.

Of the total responding, 173 indicated that they had Internet access and a large proportion of these respondents make use of this on a daily or weekly basis (N=131). Access to the Internet is important to establishments and the indications are that there is an increasing trend in its use for historic houses, as discussed in section 7.3, that may be worthy of study. The range and volume of electronic information is expanding and becoming more accessible. There is also a growing need for more online transactions, whether through marketing or the booking of tickets via websites. Many establishments are based in rural areas and getting access to the Internet may present some difficulties, it will certainly affect the type of connection they have and its cost, for example using ISDN or ADSL. Enabling access for establishments may lead to greater use of online resources by properties. Although email has by far the highest use, both the Internet (N=71) and local databases (N=57) were used on a daily basis by historic houses. When the figures for the weekly usage of these two are added, N=60 and N=39 respectively then both the Internet and local databases are major sources for gathering information.

Print-based resources were also popular, 90 respondents used books and periodicals either daily or weekly, and 81 respondents used manuals in the same way. As already discussed published reports by national organisations are used by properties in their work, so it is to be expected that print-based resources be used to a degree. It is however, interesting to note that access via the Internet is preferred (N=131) over print-based. It is feasible that alternate versions of print-based resources are available over
the Internet as PDFs (portable document format). This would make information accessible as quickly and as easily as possible with the use of a freely available piece of software that enables users to read PDFs. However, information on a computer screen is difficult to read for any length of time. It is likely that where possible a paper-based version would be used for ease of reading, with the exception of that material which requires currency and is not of considerable length.

When interviewed there were a variety of responses from historic houses regarding the use of the Internet. The Comptroller at one establishment said:

“As a company used extensively.”\(^{120}\)

The same person indicated the scale of electronically available resources for them:

“Electronic information is huge and 90% of it we would need to access no more than once a year.”\(^{121}\)

More importantly they see this as a developing area:

“Internet we are always developing and we use it a lot.”\(^{122}\)

It would be appropriate to ascertain exactly what was being developed because, as we have already seen in section 4.4, historic houses focus on the marketing of their properties and this is likely to be the focus for any web development for them regarding the Internet rather than devising ways to access information more appropriately.

Historic houses have indicated that they access specialist information that will most likely be needed on an individual basis. It may be that the most efficient method of

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\(^{120}\) Interviewee C, 6\(^{th}\) January 2004.
\(^{121}\) Ibid.
\(^{122}\) Ibid.
collecting this data is via email or the Internet from a consultant or another organisation.

Figure 7.2 indicates that the least used resources, on a regular basis, were film and video and CD with 11 and 32 responses respectively for both daily and weekly usage of the resources. Video and CD resources can date quickly and are not always easy to use, because they require the appropriate equipment to make the information available. This helps to explain the low figures compared to other resources as both print and online have advantages over these formats. However, while these are low in comparison to the other resources they are surprisingly high given the nature of the material. Although the content of these materials is unknown they may be used for marketing or training purposes for the establishment, explaining the relatively high figures.

There were 10 responses to the “other” category which were received from historic houses regarding the use of different formats; however many were actually specific examples of the formats already given, such as archaeological journals. In other cases specialist libraries were mentioned such as the House of Lords library and once again reference was made to their own knowledge which was discussed in section 6.3 previously. There were some formats that were mentioned that were not specifically mentioned in the survey that were noted by respondents, these being:

- Manuscript records daily;
- Newspaper articles weekly.

We can argue that newspapers may belong in the periodicals category, but manuscript records are clearly different and are an important additional source of information for historic houses and something that they use on a regular basis.

It is clear that some establishments did encounter some confusion on what was being asked regarding formats, as can be seen from the ‘other’ responses. However the responses showed a preference for resources made available electronically.
7.3 Establishments use of the Internet and IT

Of the total sample population 173 historic houses (the majority of them) had access to the Internet. The location of the property can have an impact on when and if establishments gain access to the Internet and the resources it can make available. It should also be noted that a rural location also has an impact on all their access to information as was discussed in sections 6.7 and 7.2.

One of the most striking discoveries came from the interviews and indicates the disparity that exists between establishments and the access to, and use of, information. Establishments that have large visitor numbers and are consequently well known “tourist attractions” in their own right made the following comment regarding their use of the Internet:

“I don’t think we could survive without it.”

They have a notable reliance on the Internet, however what is not clear is exactly what type of information they are using it to retrieve.

Other properties that do have visitors but not on a large scale do not have the same reliance on the Internet and have been quoted in section 6.7 as not using the Internet due to their lack of training and experience in using it. These comments show both a reluctance to use the Internet and a wariness of the technology. This is not necessarily because they do not want to. It was clear from the interviews and the manager’s manner that they were not averse to it, but had different reasons for not doing it, including their age and the hope that the next generation would introduce it; and also time, some owners were having to look after the house and the family within it which gave little time left to devote to new pursuits, however laudable. Few of these houses have high numbers of staff and most have none at all making it difficult to find time to learn a

new skill and improve their use of information. Although there are a high number of historic houses that are connected to the Internet, how many of them actually make use of it and more importantly how many of them make effective use of it.

In 7.2 it was noted that one historic house had no electronic resources despite being connected to the Internet and used the phone for most queries and contact. This occurs with some properties where there is a reluctance, either on the part of the parent organisation or the individuals that manage the place, to use IT. Of those properties that stated that they relied on the use of the Internet there were some further comments made by the property managers that indicated that even at these establishments there were inadequacies in the use of information amongst the staff cohort. One manager stated:

“I don’t use them as much as they do”.124

when asked about his use of computers and additionally when queried about their own use of the Internet they said:

“Personally virtually none. If I want different information from the Net then I would ask somebody to trawl around”.125

“We’ve got databases; we’ve got all types of different information for the people involved in group bookings.”126

This can be viewed in two ways, either there are enough staff and specialists who trawl the internet for information for others or there is a gap in the skills of some of the staff. The visit to the property gave the impression that the former was not the case and that training in the internet and IT might provide the staff with a better skill set and save

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125 Ibid.  
126 Ibid.
everyone’s time. Asking other staff to ‘trawl’ could take them some time, especially as they are unlikely to be information professionals.

It is worth putting this in some kind of context for the heritage sector. *A Netful of Jewels* told us that museums can be centres for digital learning and have the “seeds” to develop this in the sector. Importantly it notes that trained staff are required to make this happen. The *Renaissance in the Regions* report reviewed how museums can work effectively together to deliver an inclusive service for the public and protect the nation’s assets for generations with the help of technology. It discussed schemes to allow museum staff to “acquire new skills” and stated that “ICT has an important role to play in widening access” (*Resource* 2001, p.7). Most importantly it says “regional museums are underpowered in terms of ICT” and emphasised that although there were some leaders in the field who had developed innovative museum provision using ICT many had some way to go. The *People’s Network* initiative in the library and information sector led to many local authority library staff being given ICT training. This cascade of training is required to enable all staff to support developments in the sector to deliver the ambitious plans for museums as educational centres for all through their collections and outreach and is noted in the *Renaissance in the Regions* report that Resource should take a lead “on ensuring that appropriate skills development and training is available” (*Resource* 2001, p.113). Although much of the focus is on delivering education in the sector ICT is implicitly required to deliver this and must be included as part of development activities.

There was some pessimism expressed regarding the Internet with some owners replying:

“...I think it is quicker to look it up in a book quite frankly...”

and adding

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127 Interviewee B, 7th February 2004.
“We have a card index with everything written in it.” \(^{128}\)

Their chosen method of access to information is more ‘hands on’, which is obviously preferred as indicated by the comment regarding the speed of using a book, which in some cases is accurate. It will depend on what they are using the information for as to the benefits of using the Internet. If ICT training had a higher profile within the sector then there might be less aversion to the Internet and a willingness to adopt it for the benefit of properties.

The benefits of the Internet are clear however and the comment:

> “I’m on quite a lot of websites,” \(^{129}\)

indicated that they placed some faith in the marketing power of the Internet as a resource even if they did not appreciate its potential in other areas.

### 7.4 Outstanding issues for the use of information

Historic houses are beginning to achieve improvements in the use of information through increased use of the Internet and IT. Additionally owners and managers have expressed the fact that:

> “I can usually get information but there is no saying what the quality of that information is going to be like.” \(^{130}\)

Most establishments appear to be able to source the information they need, but they have no idea of how good that information is. Sometimes it is not until after they have completed some form of restoration or change that they discover how good the quality of the information was. One property was quoted as saying:

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\(^{128}\) Ibid.

\(^{129}\) Ibid.

\(^{130}\) Interviewee A, 2\(^{nd}\) March 2004.
“My dad was made to uproot trees that he had planted because they weren’t considered historically correct”.  

Having carried out a change to the property the owner had to then change the work carried, consequently involving more cost, due to the inaccurate data that they had used to inform themselves. The same property also stated:

“If the job has been really well done and we’re really happy with that I’ll pay the bill.”

The information used to obtain a restorer was uncertain and it is only when the job is completed either satisfactorily or otherwise that the owner discovers the quality of the information they used.

Table 7.3 shows the responses received from respondents of the questionnaire survey when asked what difficulties they encountered when trying to access information. Many of these are sourceable items of information, for example financing, financial planning and grant applications. There are sources of funding that are available and how information on how to source and approach organisations are readily available from sources such as *The Complete Fundraising Handbook* (Clarke and Norton 1997) and the Heritage Lottery Fund (Heritage Lottery Fund 2005).

Another grouping of information revolves around marketing and where to find visitors, what tour companies looking for and how to make available good accommodation nearby. All of these relate to the tourism aspect of activities that properties now find themselves engaged in.

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131 Ibid.  
132 Ibid.
Related to this is the need for some competitor information to see whether the establishment is operating in a comparative manner to other establishments and also some statistical information from organisations to which they are affiliated.

Notably there are a number of problems indicated that occur with the provision of local information, whether regarding local services or local history on the house and family. This links to section 7.1 where Table 7 shows the importance placed on local sources of information by historic houses confirming that whatever information is made available via the Internet or nationally the most relevant sources are local, whether internet based or otherwise.

Some of the comments received indicate problems that are not unusual with the provision and delivery of information, the first being slow delivery and the second that there is too much information to cope with. These can cause difficulties for a smaller establishment with only a family looking after the property. Interestingly one property raised the issue of IT training which was discussed in 7.3 above.

During the interviews owners and managers of historic houses were asked about planning and whether there were strategies that existed that the property was working to, in order to achieve the desired change required. The intention was to ascertain whether the use of information was specifically mentioned in any of these plans. Comments that were expressed included:

“I think if we have fallen down in the past its on long term planning for the business because its evolving at such a rate of knots it’s difficult to plan for it long term”\textsuperscript{133}

and also

\textsuperscript{133} Interviewee C, 6\textsuperscript{th} January 2004.
<table>
<thead>
<tr>
<th>Problems noted by historic houses</th>
<th>Number of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benchmarking data restricted to ALVA</td>
<td>1</td>
</tr>
<tr>
<td>Comparative information on similar establishments</td>
<td>1</td>
</tr>
<tr>
<td>Consumer spending habits on merchandising, visitor numbers to similar establishments and consumer expectations</td>
<td>1</td>
</tr>
<tr>
<td>Don’t always have useful information</td>
<td>1</td>
</tr>
<tr>
<td>Education books and special interest groups</td>
<td>1</td>
</tr>
<tr>
<td>Financial planning and budgeting</td>
<td>2</td>
</tr>
<tr>
<td>Financing methods</td>
<td>2</td>
</tr>
<tr>
<td>Grant application help</td>
<td>3</td>
</tr>
<tr>
<td>How to accommodate visitors for castle functions</td>
<td>1</td>
</tr>
<tr>
<td>Information on what tour operators want</td>
<td>1</td>
</tr>
<tr>
<td>Information too slow</td>
<td>1</td>
</tr>
<tr>
<td>Legal advice</td>
<td>1</td>
</tr>
<tr>
<td>Local information on crafts and groups</td>
<td>1</td>
</tr>
<tr>
<td>Market research</td>
<td>1</td>
</tr>
<tr>
<td>More analysis from Historic Houses Association</td>
<td>1</td>
</tr>
<tr>
<td>More statistics on museum users</td>
<td>1</td>
</tr>
<tr>
<td>Need more local information on house and family</td>
<td>1</td>
</tr>
<tr>
<td>Need to keep up with legislation</td>
<td>2</td>
</tr>
<tr>
<td>Some sites require local knowledge and often information incorrectly recorded</td>
<td>1</td>
</tr>
<tr>
<td>Too much information that is often contradictory</td>
<td>4</td>
</tr>
<tr>
<td>Training for IT use</td>
<td>1</td>
</tr>
<tr>
<td>Where to find visitors and groups</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 7.3 Problems noted by historic houses regarding the use of information
“We walk into a room and find half of it on the floor then we know we have a problem”\textsuperscript{134}

It was noted from the interviews that planning was not carried out to any great degree, and often activities were dictated by problems that arose and needed to be overcome, although most realised its importance and some were looking to change things for the future.

7.5 Requests for improvements

Historic houses were asked in the questionnaire survey what difficulties they encountered when trying to obtain information as has been discussed above in section 7.4; additionally they were asked to express what might support them in their use of information. Table 7.4 shows the requests made by establishments regarding the use of information and their needs.

There are requests here for Internet connections and Internet training showing the perceived value to establishments of this source and also their requirement to be able to access it and access it effectively. We also see the need for access to better databases and software. The size of some properties may prohibit the spending of money on access to expensive software and databases, especially as they are likely to have to pay full commercial rates for its use. We also see some establishments requesting that more information be made available via the Internet, so it should be noted that properties would like more electronic access.

There is also clearly a need for central directories for heritage organisations and those working within the heritage industry. Although it is unclear exactly what is meant by this, there are now available directories available within the industry, although it was not the case to any great extent when the survey was carried out. Examples of the

\textsuperscript{134} Interviewee A, 2\textsuperscript{nd} March 2004.
availability of this information include the Building Conservation Directory (Cathedral Communications 2005). One property owner when interviewed stated:

“If I thought that somebody was going to produce a leaflet or a page on a website that actually recommended people I would be very interested.”

This gives some indication of what form of directory is required by some, yet other requests in the table such as grant support and the need to find gardening groups indicates that there are numerous sources of information that they need.

The requests also indicate that importance is created to library and information related skills. Some properties were requesting access to reference libraries, others to indexing and cross referencing skills and some even wished to have a broker. All of these facilities can be made available, but it is clear that they do not know where to go to get the support that they need.

<table>
<thead>
<tr>
<th>Request from establishment</th>
<th>Number of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>A directory for heritage organisations</td>
<td>1</td>
</tr>
<tr>
<td>Better databases and IS provision/software</td>
<td>1</td>
</tr>
<tr>
<td>Better signage</td>
<td>1</td>
</tr>
<tr>
<td>Conservation and maintenance specialist advice</td>
<td>1</td>
</tr>
<tr>
<td>Difficult to find gardening groups</td>
<td>1</td>
</tr>
<tr>
<td>Forum to discuss business environment</td>
<td>1</td>
</tr>
<tr>
<td>Increased use of internet by establishments</td>
<td>1</td>
</tr>
<tr>
<td>Inland revenue meetings</td>
<td>1</td>
</tr>
<tr>
<td>Intelligent update on grants available</td>
<td>1</td>
</tr>
<tr>
<td>Internet connection would save us time, less hardcopy</td>
<td>2</td>
</tr>
<tr>
<td>Internet training</td>
<td>1</td>
</tr>
<tr>
<td>Local tourism visitor spend profiles and relevant grants available</td>
<td>1</td>
</tr>
<tr>
<td>Marketing in locality</td>
<td>1</td>
</tr>
<tr>
<td>More communication and exchange of info. Info often there, but no time to access it</td>
<td>1</td>
</tr>
<tr>
<td>More information</td>
<td>1</td>
</tr>
<tr>
<td>More on intranet would be good (NT)</td>
<td>1</td>
</tr>
<tr>
<td>Need manpower</td>
<td>1</td>
</tr>
<tr>
<td>Reference library would be useful (NT)</td>
<td>1</td>
</tr>
<tr>
<td>Reliable indexing and cross-referencing</td>
<td>1</td>
</tr>
<tr>
<td>Shared experiences with similar sized establishments</td>
<td>1</td>
</tr>
<tr>
<td>Since foot and mouth feel need to embrace local groups</td>
<td>1</td>
</tr>
<tr>
<td>Time for research</td>
<td>1</td>
</tr>
<tr>
<td>To have computer and internet link, but office and phone lines limited</td>
<td>3</td>
</tr>
<tr>
<td>Use of intranet and more PC less manuals</td>
<td>1</td>
</tr>
<tr>
<td>Visitors risen from 8000 to 36000 by gathering and giving out information in innovative and different forms of communication</td>
<td>1</td>
</tr>
<tr>
<td>Would it be possible to have an information broker to do 6 months research on relevant topics</td>
<td>1</td>
</tr>
<tr>
<td>WWW directory of specialist organisations in heritage industry</td>
<td>1</td>
</tr>
</tbody>
</table>

*Table 7.4 Support that would help in the work of historic houses*
7.6 Conclusions

Previous chapters have shown that historic houses do not use information in the most advantageous manner to achieve the required level of support for their activities. Despite this, there are signs that indicate that the importance of information and its use at their establishments is known to them and given the appropriate opportunity they can take advantage of it.

Historic houses are reliant on locally based sources for their information. Establishments used paper and databases more frequently at a local level than either regional or national. They rely partly on their own knowledge and history of communications with others locally, and also the fact that the establishment is involved in supporting and depending on the local economy. The importance placed on local sources of information by historic houses was high, as is seen in the table in section 7.1, confirming that whatever information is made available via the Internet or nationally the most relevant sources are local, whether internet based or otherwise.

The exception to this reliance on locally based sources is the use of published reports. Many establishments are owned by the National Trust, English Heritage or other organisations and as such will be provided with access to manuals, guidelines and other published works, (even if at a cost), to support historic houses in their work. Establishments are also likely to want to keep up with the latest Government reports that may affect their establishment. It can be concluded from this that involvement of external organisations, whether through ownership or membership, has an impact on establishment’s use of information. Despite the impact of nationally based sources it is clear that there is a heavy reliance on local sources by those managing historic houses.

The Internet was quoted as a source and was considered by some as an international resource; however that is a broad phrase that has little meaning without further clarification, and without knowing exactly what is being sourced, to be able to draw any conclusions from. Comments made by those interviewed indicated that its use was
split between properties, some will use it as a considerable resource used to attract visitors, while others will use it merely to book holidays. Without knowing what is being sourced via the Internet it is difficult to draw any conclusions other than that further investigation is required.

Those properties that have higher usage of the Internet still have their own difficulties which, according to the comments received indicate that they may either have enough staff and specialists who trawl the internet for information for others and on whom others rely, but there is still a gap in the skills of other staff who may need to access information on the Internet. Appropriate training on the internet and use of IT might provide the staff with a better skill set and save time. Using other staff to “trawl” could take them some time, especially as they are unlikely to be familiar with the area they are going to be investigating and are also unlikely to be information professionals or have received any training.

It was clear from the high numbers of historic houses that have access to the internet that it is important to them. There are also indications that there is an increasing trend in its use for historic houses that would make further study of the trend important. The range and volume of information available for historic houses on the Internet is expanding and becoming more easily accessible. The responses received from those managing historic houses showed the preferences for resources made available electronically. All that is required is for establishments to undertake some form of training in search methods and analysis. Currently they do not know how to access this training or support.

There is also a growing need for more online transactions, or e-commerce. Many establishments are based in rural areas and getting access to the Internet presents some difficulties, although competition in the marketplace may finally provide access to some areas, however location will affect the type of connection they can obtain and the level of cost. Enabling access for establishments will lead to greater use of online resources by properties.
Historic houses were given the opportunity through both the questionnaire survey and the interviews to be able to make requests or suggestions for the type of support that they would like to help them in their use of information. Their suggestions indicate that they do give importance to library and information related skills. Some properties were requesting access to reference libraries, others to indexing and cross referencing skills and some even wished to have access to an information broker. These are all skills that library and information services and professionals can supply, but it is clear that they do not know where to turn to get the support that they need.
Chapter 8

Collaboration and co-ordination

The library and information community uses collaboration to ensure that users benefit from the widest possible access to the information they require whatever their circumstances. One of the best examples of this collaboration is that of inter-library loans. Users can make requests for materials that are not available at their library and get access at their own library. Alternatively there are other schemes that allow users to visit other libraries to view the information they are interested in. Historic houses might also benefit from collaboration and co-ordination of resources to enable them to improve their management of their activities and resources at their properties. In this chapter we shall review what mechanisms are available for historic houses to get access to improved information and how they collaborate with each other, and most importantly to what effect.

Historic houses have contacts with different heritage bodies, quite often at the local level. Some properties have dealings with as many as 29 organisations, but others have none at all. The mean number of organisational contacts is 7.12, indicating that there is a reliance on others for information provision of some nature. There is a gap between properties’ access to information here; some properties are clearly using relevant bodies to source information to a higher degree while others appear to be ignorant of what is available to them.

Local organisations with which establishments have a relationship, especially the local authorities, appear to provide notable support in the provision of information. The questionnaire survey also confirmed a finding derived from the literature review: a large proportion of the information required was for the purposes of conservation and preservation. The highest priority was a need for information to help with maintenance
of properties. This demands specialist knowledge and information in the context of historic houses. The large number of organisations contacted for information, ranging from the Woodland Trust to the Heritage Lottery Fund, indicates the complexity of historic property management.

There are a number of reasons why local relationships have evolved, much of which is based on the need for proximity. For example historic houses know that they do not have the requisite skills and knowledge to handle certain types of historical artefact and need to know where to go to get the help that they require. One owner said that the:

“County Records Office holds family archives.”

The records had been passed to the County Records Office to ensure that they are protected and accessible for future generations. They are in addition, a part of the history of the county. This ensures that historic family documents are kept securely and managed by professionals who know what is required to preserve them. However this is sometimes the only collaboration and coordination of information based resources at a property. The value of maintaining the family records is recognised, but the value of other management of information-based resources is missed.

Quoted above is the number of organisations that property managers deal with in the course of their activities; there are considerable variations. On average managers talk to more than 7 organisations during the course of their work and evidence that has arisen from interviews, such as that in sections 6.2 and 7.1, indicates that although property managers do talk to a number of organisations and even individuals, such as accountants, they request information, but there is no suggestion that they collaborate with them to share and use information effectively. Unlike the information sector where libraries and other agencies often share resources and collaborate to achieve joint objectives, there is no evidence that this is the case in the historic property sector. There is active competition between properties for visitors, events and other commercial.

services and products. The larger properties will take material from the best source they can find; smaller properties do not have these resources and are therefore at a disadvantage. One clear example from a manager at a large and well known property was received during the interview stage of the study:

“What we try to do is go to the most professional advisor we can find. It might be the Victoria and Albert on some aspects of things; it might b the electricity board on others.”\textsuperscript{137}

When this was queried it was emphasised that these sources were:

“What selected for their expertise.”\textsuperscript{138}

This could result in a significant cost for the organisation, but the interviews gave the impression that this did not cause a problem.

“What usually find money for it, but want value.”\textsuperscript{139}

Not all properties have the resources to access the “best” information possible in the same way that a larger property could and will therefore resort to other ways of obtaining what they need or at worst not bother at all.

8.1 Support from heritage organisations

It has been noted that some historic houses do have support from heritage organisations. Many properties are managed by either the National Trust or English Heritage and have considerable information resources at their disposal. Properties experience at accessing this information can be considerably different and is not always beneficial. One member of staff stated:

\textsuperscript{137} Interviewee C, 6\textsuperscript{th} January 2004.
\textsuperscript{138} Ibid.
\textsuperscript{139} Ibid.
“Sometimes it is difficult when you phone to get information as there is so many departments.”

The historic house concerned knows that they can get the information they need to solve their problem, but actually accessing that information is not always easy. At some point they may give up and the consequences could be considerable, depending on what the initial query was. If it was to do with the preservation of something on the site he delay may be destructive, if it is to do with the running of a retail outlet then it will not be as proportionally damaging.

What is clear is that the access to support and how it is provided is important to the recipients of the information. It does affect their perception and ability to cope with accessing information.

An interviewee at a property supported by a heritage organisation noted that if they needed information on anything, such as a query received from a newspaper for a story they would:

“Refer to different manuals so it will tie in.”

Their manuals or guidelines refer to each other and cover many aspects of running the property. For example they stated that:

“We’ve got the conservation guidelines.”

However what was notable from the interview with the property was that there was clearly of lot of access to the organisation which took place on the phone. They said that they had access to:

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140 Interviewee D, 2nd December 2003.
141 Ibid.
142 Ibid.
“One to one support on the telephone.”\textsuperscript{143}

This appeared to be a preferred method of communication for them and although access was available to manuals, the amount of information that they had to look through was daunting to them. Personal contact is usually preferred by individuals and benefit additionally from ‘experts’ who do come to the sites to support their work. One person noted that:

“A lot of them (Head Office) will not be familiar with a lot of the sites so people based in our regional office often come out to the sites.”\textsuperscript{144}

They have access to both national and regional office support and this is in addition to the documented material that they have to help them in their work. However it is also notable that they are unclear as to where to begin and who to contact a times. The same staff stated that:

“Some departments have been sacked, some have been created, the structure has completely altered.”\textsuperscript{145}

This will be discussed further later but large heritage organisations do change their structures, sometimes too often, and this causes difficulties for the staff who are working at the historic houses as they are unsure of where to go for the help they need. The above quote was made in the light of a review of the organisation which led to a restructure. The staff indicated that this occurred ‘often’, with each Director’s review, and did present them with difficulties and did confuse them

Another heritage organisation also has similar methods of working. They too have an Intranet, however when interviewed they stated:

\textsuperscript{143} Interviewee D, 2\textsuperscript{nd} December 2003.
\textsuperscript{144} Ibid.
\textsuperscript{145} Ibid.
“We are now using a lot of paper because we are printing out things that are coming by email or from over the Internet.”¹⁴⁶

This shows a reluctance to use the computer to find information stating that they use:

“Property held information, functional department staff, head office staff.”¹⁴⁷

They too use the phone and have access to staff at a regional level that look after 20-30 properties giving them support for their needs even though they are individually responsible for the property.

Other organisations operate differently but are still available for help and support. For example the Historic Houses Association (HHA) is similar to a membership association to which properties belong and have access to publications, which they can buy, but also to help lines. One historic house is quoted as saying:

“Someone like [a consultant] or Historic Houses Association have a help line. I would definitely get in contact with them and then speak to someone in Scotland.”¹⁴⁸

Norman Hudson, an author and noted expert in areas of importance to the sector, such as tax, works in association with the sector and the HHA to provide additional support for properties. It should also be noted that properties will also go to other organisations, such as English Heritage or the Scottish Landowners Federation, as noted in the quote above, as they provide advice on listed buildings and works that are allowed, or not, to the property. The support is there if individuals are able to take advantage of it. Properties did not always make comments about organisations which they used, and the questionnaire survey indicated that some did not contact any organisations, indicating

¹⁴⁷ Ibid.
that some are unaware of the possibilities open to them or are happier with their own local sources, as noted in chapter 4 when tacit knowledge of individuals was discussed in the light of their search for information and their preferences for finding information. One historic house, when talking about financial information, stated:

“If I get any of that sort of information then I forward it on to [a consultant], the accountant.”149

This reinforces their use of tacit information, relying on their own knowledge of where to go to resolve an issue. Each historic house has a different set of activities and a different background and personnel, consequently their practices and methods have evolved over time, often developing with the characteristics of the owner or controlling organisation.

8.2 Collaboration within the heritage sector

Collaboration between the larger organisations, such as English Heritage and the National Trust, also appears to be limited. Comments made by property managers indicate that collaboration between properties belonging to different organisations does not occur very often and can be problematic. It is not just the organisations that make collaboration difficult. There are many properties in private ownership and their mindset is considerably different to that of the National Trust or English Heritage.

The Duchess of Devonshire said of her home, Chatsworth that: “The houses were built, decorated and furnished at the behest of their owners to be lived in” (Devonshire 2001, p.146).

This is at odds with the view of the National Trust. The Duchess of Devonshire has a copy of the National Trust Housekeeping Manual (Sandwith and Stainton 1986) and

says: “Through this absorbing book the housemaid is turned into the next best thing to a
museum curator” (Devonshire 2001, p.146).

This indicates the tensions between those who live in historic houses and those
organisations who are responsible for maintaining the fabric of unoccupied houses and
why collaboration is difficult in the sector as there are many viewpoints to consider.

It is clear from the current literature that there is enormous activity and developments
within the heritage sector. The sector is currently collaborating on a “History Matters”
campaign, which aims to “teach not history itself, nor even the lessons of history, but
why history matters” (Fry 2006, p.29).

Stephen Fry’s keynote address argued that we must remember what it was like to be a
“Roman”, a “Jacobite” or a “Chartist” (Fry 2006, p.28-30). This is being promoted at
historic houses across the country through the Civic Trust, Historic Houses
Association, English Heritage and the National Trust. This type of collaboration on a
national level does happen and raises the profile of historic houses for everyone. The
historic house community is competitive and though all those involved in the sector are
set upon the same end purpose, establishing the survival of properties as a legacy for
future generations, there is political unease and a wariness of each other in the sector
despite the fact that many collaborate with each other in different ways.

The Historic Houses Association (HHA) represents private owners of historic houses.
Of all Britain’s built and national heritage it is estimated that two thirds is supported by
a private owner (Wilkin 2005, p.13-14). This means that there are more properties
being looked after by private individuals than by all the national bodies combined. As a
result of Government policy to not give relief on maintenance costs for historic
buildings owners are forced to go to English Heritage for grants. The growth in the
sector has led to a “thinning” of available funds and consequently some hardship in the
sector. Wilkin states: “The situation is serious in the longer term and needs to be
addressed” (Wilkin 2005, p.13-14).
This leads to a prickly relationship between the two organisations, but does not preclude collaboration. For example Wilkin reports that English Heritage has developed a more “client-friendly philosophy” to help owners with designation arrangements. He also notes that advice is informed and professional from English Heritage (Wilkin 2005). As a final comment on the HHA’s relationship with English Heritage Wilkin is impressed with how they have developed and promoted their own properties in an overcrowded sector and states: “This competition funded with Government money, actually disadvantages a sector English Heritage exists to support” (Wilkin 2005, p.13-14).

This underlines the prickly relationship between the organisations and is not inconsistent with the worries that the National Trust had when English Heritage was created. The view from English Heritage is that: “In the event, competition seemed to generate public interest to mutual benefit” (Rumble 2005, p.4-6).

It is debatable, considering the comments from the HHA above whether the National Trust has the same view. Efforts to make the sector more inclusive do continue, which argues that there is still considerable competition and possibly dissension in the different ownerships of property. In the East Midlands there are a high proportion of properties in private ownership and access to them can be limited. Part of the reason for this is that they “do not have the same public funding opportunities” (English Heritage 2005, p.15).

The Heritage Education Regional Outreach Project (HERO)150, funded by the Heritage Lottery Fund, is designed to bring five houses in private ownership to the attention of the public through demonstrating best practice to the education and heritage sectors by working with the Heritage Education Trust (English Heritage 2005). Projects like this may, over time, bring greater partnerships and benefits to the heritage sector.

150 http://www.heritageeducationtrust.org.uk/hero/index.html
English Heritage does have a role to play with local authorities. Large scale developments such as urban developments attract the involvement of English Heritage during the planning process. Lincoln, for example, received a visit from a joint English Heritage/Commission for the Built Environment Urban Panel when regenerating their city. Plans were scrutinised and agreed and English Heritage were involved further in the partnerships delivering conservation plans, master planning and characterisation (Laidler 2005, p.16). This is considerable involvement with projects on a large scale, but how much involvement with the national bodies do many local authority heritage sections receive and how much are they in a similar position to private owners when trying to maintain their historic environment on a local and regional level?

Changes to the way that heritage sites are registered will come into force as part of the Government’s approach to protecting the UK’s heritage (Office of the Deputy Prime Minister 2004). Previously there have been different registers where historic sites have had their sites recorded. Consequently historic houses have found themselves on a number of different registers due to the variety of historical assets that may be found at any one property. For example the Godolphin Estate in Cornwall has archaeological remains, Godolphin House itself, a mine of historical importance and parkland. Under present legislation there are “20 listed buildings on the estate – four listed at Grade I - and much of the area is designated as a Grade II Registered Park and Garden” (Guthrie 2006, p.11).

Additionally the property is part of the Tregonning and Gwinear mining districts which has been proposed for World Heritage status (Cornwall and Scilly Historic Environment Service 2007). Cornwall County Council has identified important archaeological remains at the property and English Heritage has recommended: “statutory protection of most of the estates mining remains” (Guthrie 2006, p.11).

This complex pattern of registers and protection is finally being addressed with the proposed introduction of the Register of Historic Sites and Buildings for England (RHSBE) (Department for Culture Media and Sport 2004). This will allow the complex
pattern noted above at Godolphin to be addressed by bringing together all the aspects of the property under one register entry. This new Register will have a main section maintained by English Heritage, including nationally and internationally significant sites, with a further local section maintained by the local authority. This is a considerable piece of co-ordination and collaboration that could prove to be of significant benefit to historic houses as they will no longer be talking to numerous different registers to ensure up to date information. More importantly it means that different parts of the sector must talk to each other and information is shared and brought together.

Collaboration on this scale is not easy and the benefits are substantial. It is possible today due to the developments of management of information and the possibilities of combining databases that technology now affords everyone if the funding is available. The size of the task is not inconsiderable, which is why pilots have been run, involving properties such as Godolphin to determine if a unified register was even plausible. The barriers to the successful implementation of such a system are large, as the data must be consistent to make it accessible and the many layers of complexity in the heritage sector must be represented and streamlined to be understandable to be usable.

The point regarding funding is well made as the view of the Government is that “English Heritage is funded at a level which is sufficient to discharge its responsibilities and to deliver a high standard” (Department for Culture Media and Sport 2006, p.5). The Government believes that their main proponent for delivery in the heritage sector, English Heritage, is funded to an appropriate level and should expect no more. However the Government has received evidence that the heritage sector, as noted in the literature review, is noted for the part it plays in attracting tourism to the UK. In the same response above they request that DCMS do further research to provide evidence that public heritage investment leads to further investment from private and voluntary sources and submit this to the Treasury for consideration (Department for Culture Media and Sport 2006, p.1-20). Although this provides no guarantee it may lead to
further funding, especially as the Government indicate in the same response how important they see the sector for the 2012 Olympics in London.

The funding issue is made complex for the sector due to the public’s view of heritage; it is after all their heritage, and there is a perception that funding should not be obtained by any means. An example is the recent furore surrounding the proposed advertising hoardings that are to be erected at St. Martin in the Fields in London (Sanderson 2006, p.5). This is one of the country’s most photographed places and the hoardings will spoil that view; however the need to raise money for repairs is also paramount. The conflicts between preserving the heritage ad funding that preservation are not straightforward as the public do not always feel that the ends justify the means for the heritage sector.

There is activity in the sector that tries to engender collaboration, but its effectiveness is questionable. Successful collaboration between properties that belong to the same organisation is beneficial.

However meetings, even at a local level, between historic houses with different ownership, appear to encounter some difficulties. One custodian said:

“I did use to work with English Heritage at Kenwood […], but they were terribly bureaucratic.”151

This was to share information on procedures but in the end petered out due to the nature of the meetings. Similarly another attempt at sharing information was described in the following comment.

“I used to go to meetings regularly with other museum practitioners in London, but I found that was a problem as I come from such a large organisation I was being asked for information …… and I didn’t get much out of it.”152

152 Ibid.
This shows that collaboration is difficult in the sector, due to the different cultures of the properties involved and the need for all participants to benefit from the process.

### 8.3 Planning for the future at historic houses

One of the key ways that any organisation can ensure that the management of the historic house is effective is through planning for the future. This would help to secure the survival and development of the property.

As part of the research historic houses were questioned about their level of planning to try and determine if their existence was managed on a day to day basis or if an ongoing plan for the protection and development of the property was being followed.

Clearly the comments made by historic houses when interviewed show that there are many different approaches taken by properties towards their running. Firstly some do take pro-active approaches towards planning for the future.

> “For the future, long term, short term, yes, we have a strategy. We’re trying to develop a long-term strategy for the business side. We have always had a long-term strategy for the estate…..and preserving for future generations.”

This comment, from staff at a large historic house, (in terms of visitor numbers), indicates that they have plans in place, but are still developing this for the long term. This is from a well developed commercial enterprise, yet they are still developing long term strategies. This is because the business is still a family run activity and as such they are extending their home to others, not building a FTSE 100 company.

This same historic house not only has a strategy, but additionally:

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“We have corporate guidelines……OK’d by the family……. We’ve got
thousands of guidelines when you think about it.”\textsuperscript{154}

They have also developed guidelines that determine how the property and its guests
should be looked after, and most importantly, that all of the instructions are reviewed
and validated by the family, ensuring that it does not actually end up being run like a
company.

English Heritage properties, unsurprisingly, have plans for the future. The property
visited for the research stated:

“Definitely have forward plans for next year.”\textsuperscript{155}

These plans though revolve around activities for the year and maintenance schedules.
Beyond this the property also benefits from the organisational structure and the
planning afforded by that.

“We have five year reviews from (the organisation) and where the organisation
needs to be going and a quinquennial review.”\textsuperscript{156}

English Heritage has its own 5 yearly reviews to determine the direction the
organisation takes and in addition is subject to external reviews such as the
quinquennial review from the Department for Culture, Media and Sport analysing its
effectiveness (English Heritage Peer Review Team 2006). This indicates that there is a
planning process and a structure to the organisation’s planning, which in turn relates to
the properties’ planning and activities. However the comments from those managing
the property indicate that this is not always a positive experience. They said that there
were:

\textsuperscript{154} Interviewee C, 6th January 2004.
\textsuperscript{155} Interviewee D, 2nd December 2003.
\textsuperscript{156} Ibid.
“Regular changes with chairman every five years. Delays and audit procedures change with Chair.”

This shows that where they experience changes of personnel, especially at the head of the organisation, problems occur operationally that detract from the mission of protecting the heritage, causing some difficulty for those on the front line. This is one perception of the reality of the organisation and its mission, but it must be remembered that the view from the top of the organisation may be different and that change is required to meet their aims and objectives. The perception of reality will depend on where an individual stands within the organisation at any given moment in time. Similarly the National Trust properties have their own planning cycle:

“The national strategic plan which is also a 3 year plan, there is a regional plan as well.”

At a national level the Trust produces a 3 year strategy (National Trust 2004) which outlines the challenges and direction that the organisation will adopt including support in the regions for creating regional business plans. Appointments to the Board of Trustees are responsible for reviewing the trust’s finances for three years and to shape the direction of and review the strategy (National Trust 2007a). Properties adopt this strategy to develop their own local implementation plans for the year including conservation work to be undertaken, managing affairs and developing people. This is still a development process, as the national strategy is intended to make it easier for people to work at different properties. Although still developmental the staff anticipate that:

“Everything becomes laid out in a standard way and linked together and hopefully we will all be moving in a similar direction.”

159 Ibid.
Privately owned residences also have different approaches and the size and location of the property can have a direct impact on whether they are planning for the future. Previously we saw a historic house that has large visitor numbers above, but those that operate on a much smaller scale can have dissimilar approaches to planning. One historic house owner stated:

“We go up to 2050 in our management plan.”\textsuperscript{160}

This is a considerable piece of forward planning, however it arose out of conditions imposed on the property by heritage organisations that sometimes provide grants for building works. The owner said:

“Part of the deal to have a management plan and try to agree with Historic Scotland how we were going to look after the place.”\textsuperscript{161}

This does to some extent limit what they are allowed to do to the property, but it does also mean that some security is afforded for the future of the historic house. The management plan does exist but I does not follow that it is updated on any kind of regular basis.

There are also those properties that do not see the necessity for planning. One historic house noted:

“I visualise it turning over quite happily until my son comes along and takes over and then we will probably run things quite differently.”\textsuperscript{162}

This gives a very different picture of a property that has an owner of a particular age who is maintaining the property as best they can ready for the next generation to take forward into the future. The difficulty with this limited approach is that by the time the

\textsuperscript{160} Interviewee A, 2\textsuperscript{nd} March 2004.
\textsuperscript{161} Ibid.
\textsuperscript{162} Interviewee B, 7\textsuperscript{th} February 2004.
next generation takes over the running of the property there is the prospect that the task to restore and maintain the property may be a much bigger one than if plans had been laid at an earlier stage.

8.3.1 Management of information

Planning is very much dependent on the historic house itself. Where they are part of a larger organisation they do have some support and lead on guidance. For private properties they very much follow their own agenda, but may be directed by external sources. However it has been clear from the interviews that although there is some planning, there is little or no planning regarding the management of information and even where there is some, it is not considered planning and does not involve information professionals.

Despite that that historic houses do not have strategies or plans in place that relate to the management of information it can be seen that information is seen as important to the running of the establishment. One property stated:

“We have a meeting periodically to analyse information, to talk about what’s going on.”\textsuperscript{163}

In addition they also said:

“Information and relationships that’s what the whole estate runs on, we try to involve everyone.”\textsuperscript{164}

Admittedly this property is one that has sizeable visitor numbers and is a notable tourist attraction and as such is continually tying to improve their establishment. It could be argued that most of the points made relate in many ways to marketing the property, but

\textsuperscript{163} Interviewee C, 6\textsuperscript{th} January 2004.  
\textsuperscript{164} Ibid.
to do this they do collect considerable amounts of information for this end. They noted in interview:

“We get as much feedback as we can from the public, as we can encourage feedback throughout the house for all the wardens encouraging people to fill in the comments slips at the end of the visit.”165

This highlights the need for data to enhance the marketing of the property. Additionally they also said that:

“We do all manner of surveys, archaeological surveys, historical surveys through to surveys of the public and their opinion.”166

A considerable amount of data is collected to ensure they can promote their property to best effect. It can also be seen that the property is collecting data that adds to the historical knowledge regarding the property including details on archaeological remains. Gathering this data will be informative not just for the property but for the nation, providing a better record of the nation’s heritage if it can be made accessible. This is the crunch as houses are silos of heritage information and make some of this available when they ‘promote’ themselves to the public. Making this data available on a wider scale is somewhat more difficult.

There are services that are attempting to pull together related data electronically to make some datasets more widely available. The Multilingual Inventory of Cultural Heritage in Europe167 (Michael 2006) is designed to bring together the diversity and breadth of cultural heritage across Europe and make it available to a worldwide audience. In the UK this is being championed by the Museums, Libraries and Archives Council (MLA) and is attempting to make digital collections available to the public. These digital collections have received funding from the museums and libraries sector

166 Ibid.
167 http://www.michael-culture.org/en/home
enabling them to be made available. How can some historic houses make their wealth of historical data and artefacts available when funding is restrictive and even if it was less restrictive would their owners feel the need to make it available at all? This is a point that needs to be thought about, as the recent objections to English Heritage’s Images of England Project indicate that owners place considerable emphasis on the security of their properties and collections and might not wish to advertise what they have (Hervey-Bathurst 2005, p.5-7).

Additionally there are other e-heritage projects that are being delivered such as MAGIC168 (Multi Agency Geographic Information for the Countryside) and the Heritage Gateway project that provide information which can help support historic houses (Dickson 2006, p.23-24). For example MAGIC provides information on environmental schemes and designations, while the Heritage Gateway project aims to provide a virtual record of monuments that can be accessed and might help properties with planning changes and services, especially as this can be accessed by the public (Cayley 2006, p.222). The gateway will enable users to search across datasets from national and local sources to give a clearer picture of the heritage sector than has been available previously.

This research has been looking for the availability of information and more importantly its use in the sector. Spectrum provides guidance on the management of information and guides curators in the appropriate use and manipulation and recording of information in museums which can help to define important aspects of collections work at national or local levels (Collections Trust n.d.). The HELM169 project has been designed to make guidance and standards more clearly available. It is intended to inform decision makers in the heritage sector about good practice (Cole 2006, p.12-18). The research showed that much work is carried out at a local level and this project aims to deliver at a local level, especially local authorities who are partners. However the information is equally valid for those in privately owned historic houses if they are

168 http://www.magic.gov.uk/
169 http://www.helm.org.uk/
made aware of it. The plan to use champions in the sector could lead to a greater uptake of the web-based service and the inclusion of e-learning materials could make it valuable.

Although we have some recognition from historic houses of the importance of information, comments received indicate that they do not always have a grasp of how to access information and how to organise it for appropriate uses. A major establishment recognises the importance of information saying:

“We can provide a much better service using it.”

However when they think of information it is related directly to outcomes, the comment:

“I’ll look at it (phone or gas deal) and make recommendations to our accountant. He’ll analyse the whole thing so there is a constant flow of information………to get the best deal.”

If reviewing finances that do directly have an impact of the property then they know where to pass the information, to the accountant, to get the best use of that information. This is compounded by the following quote:

“This is how quickly we react to information………gift aid is something that cropped up. We heard about it, got involved in it and within a month we were actually doing it.”

Here the property has reacted quickly to the information they have been provided with, but because they are a major establishment with relevant experts to hand they are able to react quickly. The same property also said:

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171 Ibid.
172 Ibid.
“Lots of places still thinking about it.”\textsuperscript{173}

Where one property has the ability to react quickly to information they have indicated that others do not and either do not have the information or do not know what to do with it. This could be problematic with something as important as gift aid.

8.3.2 Difficulties with information

Properties were asked during the research whether they have experienced difficulties in getting information. The questionnaire indicated that there were some who found information too expensive or arrived too late, but the majority thought that they had what they needed. Some have good resources to hand, hence the quote:

“\text{We have got a big enough network of people to talk to.}”\textsuperscript{174}

The property is able to particular experts or knowledgeable contact that can help them. Information is seen as important at properties but the concept of organising that knowledge is not addressed. It is considered more in terms of communication and sometimes a referral to an expert. The comment:

“\text{Everyone is proactive and just trying to improve or techniques of communicating to public and staff and sifting information}”\textsuperscript{175}

shows how communication is important and how they try to pass information on to address problems, but not necessarily about how it might be used at a later date.

Other properties have a different approach to information. Information is shared through different methods:

\begin{itemize}
\item \textsuperscript{173} Ibid.
\item \textsuperscript{174} Interviewee C, 6\textsuperscript{th} January 2004.
\item \textsuperscript{175} Ibid.
\end{itemize}
“We have team meetings twice a year where lots of different departments meet.”\textsuperscript{176}

Despite this sharing of information the same property also commented on the parent organisation:

“They’ve noted that some sites have good information and some sites have very poor information.”\textsuperscript{177}

This comment was made by staff that had worked at different properties and was also made in the light of some sights being off the beaten track and do not benefit from the internet or even a good postal service. What is being done to address this was not clear, just that the parent organisation had noted it was an issue.

Historic houses that were privately owned had a different view towards information. Some were quite proactive in their searching, for example one owner noted:

“Seminars would definitely be a source of information.”\textsuperscript{178}

They went to events that were held by relevant bodies, such as the Scottish Landowners Association. This was one of the few comments made by historic houses that related to specifically seeking information, but it echoes earlier statements which indicate that the need for information was problem related. If a problem occurs then this is an information need for which an answer is sought. At this point they use their own tacit knowledge to decide who to contact and I the quote above it was as a result of changes to tenant’s rights in Scotland.

\textsuperscript{176} Interviewee D, 2\textsuperscript{nd} December 2003.
\textsuperscript{177} Ibid.
\textsuperscript{178} Interviewee A, 2\textsuperscript{nd} March 2004.
Some owners are reluctant to do anything because they believe that the new generation will have all the answers.

“I visualise it turning over quite happily until my son comes along and takes over and then we will probably run things quite differently…..he will not need to use other people for information, he uses the internet all the time.”179

This is worrying as the new generation will have the advantages of a modern education, but they will still have learned much of their tacit knowledge from the previous generation. The lack of understanding of the need for information and the use it could be put to is likely to be wasted in the next generation as in the previous. There is also a belief that modern innovations, such as the ubiquitous internet will solve all their problems.

“If time and money were no object I would get all the information that we have and put it on the internet so that it would be easy for someone to come along and press a button and find it.”180

Clearly there is a will to make finding information easier for people, but there is a level of misunderstanding that could cause difficulties for the next generation if they do not grasp the importance of controlling and using information appropriately.

8.4 Conclusions

Historic houses have considerable contact with a number of bodies that are relevant to their work in the sector. However it is also notable that where some use a number of organisations to help them resolve issues there are others that only use a few thus restricting the amount of information that might help them resolve issues. This is consistent with the owners or managers using their own tacit knowledge to run the

179 Interviewee B, 7th February 2004.
180 Ibid.
property. Those properties that have used more organisations for information will pass this knowledge on to the next generation.

Some aspects of a property’s information and/or archives are related to the families that have lived there. This is important information to the owners of historic houses and the historical family documents are passed to information professionals to preserve them. However this is sometimes the only collaboration and coordination of information based resources at a property. Other information regarding the property is not necessarily seen in the same light.

Some properties have more information to hand due to a parent organisation or because they are a large property based on visitor numbers. However not all properties have the resources to access the ‘best’ information possible in the same way that a larger property could and will therefore resort to other ways of obtaining what they need or at worst not bother at all. Location can also affect the access to information for the property, as not everywhere is well served by post or internet.

When an issue arises, whether preservation, financial or other, historic houses rely on their own knowledge of where to go to resolve an issue, thus re-emphasising their own tacit knowledge. Historic house each have different activities and backgrounds resulting in their practices and methods evolving differently, often imitating or mirroring the characteristics of the owner or controlling organisation.

There are developments within the heritage sector that can be seen as collaborative, however the historic house community is competitive and even though those in the sector have the same mission, establishing the survival of properties as a legacy for future generations, there is still political unease and a wariness of each other in the sector. However, it is clear that properties do go to English Heritage for advice despite this, even if they are managed independently.
Market distortion is an issue in the sector. English Heritage has a strong position as both a funding body and as a preservation body which has led to some uneasiness among other historic houses in the sector. This is exacerbated by the fact that most properties suffer from the need to fund their preservation, which is expensive and complicated by the need for specialist work. Regulations laid down by Government compound this situation as they are restricted in how they can go about this. English Heritage suffers from its political connections and the role they must play in the heritage sector, both as a guardian of the nation’s heritage and a competitor through its properties. However this does not prevent applications for help and collaborative activity. Collaboration in the sector is restricted to marketing ventures between historic houses, more ambitious projects that relate to information used in the sector are taking place with museums and government bodies either local or national, which can serve the sector in some ways but does not involve historic houses.

The development of portal services, such as HELM, are beginning to bring together resources that are genuinely able to offer guidance to historic houses based on the good practice of others. This has been based on standards that have been developed in the sector, but the challenge will be to actually get the sector to adopt some of these standards so that information of different types can be shared, used and accessed more easily. This will be particularly difficult in the sector in the current political climate.

Historic houses do have some plans in place, often related to funding opportunities, but no planning for information or information strategies exist to develop or preserve the property for the future. This deficit in planning is compounded by the misapprehensions that some properties have about information and information related activities, such as the belief that the internet can solve all the problems for the next generation. Educating historic houses as to the benefits of using information appropriately and how to be organised to gain the most benefit would help the sector expand and prepare for the future.
Chapter 9

Conclusions and Recommendations

This chapter brings together the discussions from chapters 3 to 8, draws conclusions from them and then finally makes recommendations based upon these findings, both for the sector itself and for future research. It discusses the research process and the developments within the research topic that have had a considerable impact upon the intellectual process.

9.1 Reflective Summary

At the beginning of the research process the investigation focussed on the role that information plays in historic houses and the degree to which it is known and addressed in the heritage sector. This study looks at historic houses in the UK to determine whether the sector is adequately or inadequately supported with information for their mission to protect the nation’s heritage for future generations, whether this is the incumbent family, visitors or both.

The research sought to differentiate between the models of ownership of historic houses in the UK. For example properties owned privately, by the National Trust or English Heritage and local authorities were all treated in the same manner enabling the research to determine whether advantages were held by some properties which were differently designated to others. At the outset of the study the view was taken that historic houses had little access to information resources, unlike other small or medium sized businesses, which had access to business networks of a local or national nature that had been noted in previous research or was clear from information available on the web or from other sources (see 1.2 – 1.4). However the range of activities that takes place at historic houses was believed to be more diverse than any small or medium sized
company due to the fact that many properties manage their own shops, farms or other activities as part of their business as noted in 1.4. This led to the initial belief that their information needs may necessarily be more complex than similar sized businesses as noted. If it is believed that historic houses have such diverse needs where does their help and support come from? To determine this, the research set out to discover the role, if any, which other organisations play in providing information to them.

If historic houses do have access to information, as they must in one form or another, how does their practice in information management help them in running their activities related to the property? What practices are they adopting that help or hinder them in their work that could be better implemented or adapted? Sourcing what types of information resources were used provided the research with a view of the historic house’s use of information. The research identified gaps between the establishments’ information needs and the information they are using. This included determining valuable information available from other relevant sources and organisations. Bodies such as the DCMS, DTI, DETR and the ETB make a wide variety of information available that can aid historic houses to run their businesses effectively. Some historic houses have the support of a larger organization behind them. Those run by English Heritage and the National Trust have access to the resources of a larger organisation should they choose to use it. Similarly local authority supported properties have an infrastructure that helps them in their work, which includes property maintenance. The research sought to determine whether establishments know about this information and how to obtain and make use of it. The subsequent discoveries made from these investigations enables recommendations to be made on establishment’s information provision and management of information.

To achieve any of this the research adopted aims and objectives to support the process and provide a framework against from which the conclusions and recommendations could be drawn. The methodologies adopted were used to determine appropriate findings to answer the research questions.
A combination of desk research, questionnaire survey and interviews was adopted to ensure that the study was able to draw out the experience of the historic house sector, thus providing the research with the necessary data to make conclusions and recommendations from.

The desk research approach was used to determine, by analysing the available literature, the history of the sector, how it has developed to the point where it is now and what the current situation is that it now finds itself operating within. Using reports, journals, databases and internet resources provided evidence upon which an image of the sector could be derived and explained. This approach was also used to review small to medium sized businesses information use to determine whether there are any parallels with the heritage sector. The fact that there was no previous research available on information use in the heritage sector made it necessary to look at surrounding areas to get clear definition of the sector and the activities that occurs where at all practicable.

Survey methodologies were used to enhance and expand upon the information that was gleaned from the review of the existing literature, providing a clearer view on the practices occurring at historic houses. The major methods used as part of the research and data collection were questionnaire survey and interviews. The questionnaires involved the investigation of those individuals who were currently managing or “looking after” properties. The latter phrase is used as individuals who are incumbent within properties and for whom it is their home view the property in a different manner to those who may be managing it on behalf of another owner to some extent. The selection of properties and description of the process in described 3.5 to 3.8. Additionally a number of properties were selected for interview ensuring that there was coverage of different geographical areas of the UK, rural and urban properties and also size of property, (according to visitor numbers) and is covered in 3.9 to 3.10. The interview questions were put to those looking after the property and sought to expand upon the questions previously utilised in the questionnaire survey. However the majority of those individuals who were interviewed had not previously completed a questionnaire and consequently some opportunities were lost to make further
connections with the data, although it did not affect the value of the data collected during the process described in 3.10. The message that arose from using these three methods was a strong one, each method informing upon the other giving rise to the conclusions and recommendations that follow.

The approach taken for this study was to examine the impact of the information seeking behaviour of those at historic houses to see how this affected the running of the property.

When the research was initiated, some of the concepts that have arisen during the research were not as fully developed as they have become in subsequent years. One of the key areas of development that has had an impact upon the research has been that of knowledge management. At the outset of the research knowledge management was not a clearly defined area of study that was expected to have a notable impact on the research. However both developments in knowledge management and discoveries made during the research have shown that it has an important role to play in understanding practices in the sector and how any approach to developing information provision must take into account the way that information is sought by individuals looking after properties and how they use that information. Knowledge management began its journey in the library and information sector as an enhancement of information management, but during the period of the research both knowledge and practice in the field of knowledge management have developed to the point where they are relevant and have an impact upon the research.

Conceptual developments in knowledge management and changes in its application during the period of this research have led to a representation of tacit and explicit knowledge that can be important to any organisation. The tacit knowledge retained by individuals is what makes an organisation strong. Their tacit knowledge is the individual’s expertise and this underpins the performance of any organisation. The key to continued success is being able to impart this tacit knowledge to others. This is especially important for historic houses as properties can be passed from one generation
to the next, requiring that any historic background to the property and its operation be passed down. Passing down tacit knowledge from one individual to another is a difficult process, as it may involve memories based on sights and sounds, but is important to historic houses. During the research it became apparent how important this is and that tacit knowledge had an important role in the research. Consequently later review of the literature in this area took place to support some of the findings of the research.

The study has shown that increase in the size and development of the heritage sector over the centuries, from the days of the “Grand Tour” to the modern day where the leisure time of individuals and families has grown significantly to the point where visits to historic houses are a significant part of the tourism sector and are a major attraction for visitors to the UK. This has changed the view that many have of historic houses, and they are now viewed as leisure opportunities visited by the population of both the UK and overseas countries on a frequent basis. Arguably the changes in the social make-up of the country and the increase in time available away from work have actually altered the activities at historic houses. Although visitors have always been attracted historic houses and those same properties have always had tenants, farmland or other activities, there was not an emphasis on paying to visit and consequently some historic houses have developed attractions, such as the Safari Park at Woburn or the play area at Chatsworth to increase visitor numbers.

Not all properties encourage paying visitors and some actively do not take money, whilst still entertaining visitors, allowing any monies taken to go to charity. Whether payment is due or not however, the owners of the properties, whilst acknowledging this fact, are there to protect the historic asset for future generations and must carefully balance protecting the property against allowing access to it.
9.2 Main Findings

The hypotheses set out in chapter 1 are noted again here as follows:

1. Historic houses are very diverse in their management, but despite this they have common information needs.

2. The wide variety of activities taking place at historic houses means that they have a wide range of information needs.

3. Historic houses appear not to have adequate internal information services to ensure dissemination of information.

4. Current information sources are not adequately fulfilling establishments’ information needs.

5. There is scope for collaboration and co-ordination in assuring and maintaining the flow of information to historic houses.

6. There is scope for the improvement of information management within historic houses.

The present study provided a great deal of information to address these. The following results are presented as being the most important to support the hypotheses applied during the research.

1. More than half the activities undertaken at historic houses were also undertaken by SMEs. Small businesses do share some similarities with historic houses, both owners and managers have to be multi-skilled to ensure that their business runs smoothly as noted in 4.3. They key difference is that historic houses may bring in a specialist to deal with any new business activities or any problems arising.
relying on their connections drawn from their own tacit knowledge, whereas a SME owner, will typically use their own knowledge to solve problems.

2. The similarities identified with SMEs do not help when it comes to the provision of information. In the business world resources are highly structured to support small businesses and access to them is clearly and easily available through the local community (See: 4.4.) These resources are available to historic houses as well as SMEs but their different perception of their situation, which is not based on a product, but on preservation. This leads them to look to their own sector, which is inadequately organised. Information is plentiful but not clearly organised, as discussed in 6.9, and accessible to property managers who will have little or no information skills.

3. The greatest similarity with SMEs is that there is an emphasis on the leader of the organisation to be everything. Often called owner-managers at SMEs they would be responsible for all aspects of running the organisation, at a historic house the same owner mangers would also be responsible for all aspects of the property as discussed in 4.1. This will be the case for many properties, but those that are run by English Heritage and the National Trust have a different arrangement. Although property managers are allowed to run the properties their way and they often use their own tacit knowledge to facilitate this they do have access to many more experts, although they still have to steer their way through a morass of information.

4. Networking for both SMEs and historic houses should be noted as excessively important. They provide the basis of information gathering for them (See: 4.4.) These networks have grown up over their lifetimes and sometimes generations and it is this that forms the tacit knowledge they have. It is this knowledge that may also lead them to distrust more official information. These networks are based within the social context of their local environment. Historic houses
particularly have always been a part of the local community and economy and this places a particular burden and expectation upon them (See: 7.1.)

5. Historic houses do have a diverse range of activities indicated by the data collected and discussed in 5.1. Although not all establishments undertake all the activities discovered in the research they do undertake the core 12 activities and some of the 29 ‘other’ activities that the research uncovered in 5.14.

6. The key activity which is central to all others is the preservation of the historic fabric (See: 5.11.) All other activities are secondary to this. The management of visitors is closely associated with this, as they are important to the future of the property but they also have an impact on the physical fabric of the establishment. Consequently preservation aspects take priority.

7. Historic houses see preservation and maintenance of the historic fabric as unequivocally the most important aspect of their tenure (See: 5.11.) After this their care for their visitors as noted in 5.12 to 5.13. Although there are other important factors such as finance and legislation they are more interested in the fabric of the property and educating visitors.

8. Historic houses focus on educational activities as noted in 5.12. Many properties are rurally based and offer activities associated with the countryside (See: 5.13.) Properties that are based in urban areas offer similar activities as noted by the repetition of activities in 5.11 and 5.14. This also offers educational opportunities for both rural activities and also activities based around the establishment and its historical background. This is an increasing part of the mission of historic houses, as tying them in with the study of history brings new generations to their doorstep.

9. Although historic houses do have a long tail of differing “other” activities, (See: 5.14), dependent on whether they have specialised activities relating to
museums or other attractions, they share common activities for which they require information including conservation, visitor management, maintenance, education and events as noted in 5.1.

10. Sixty seven percent of properties surveyed belonged to an organisation that provided information (See: 6.1.) There were sixty five different specialist providers of information and support quoted by historic houses as discussed in 6.2. This indicates that properties do have a wide range of information needs to ensure their smooth running. They also have a number of organisations that they can turn to for support. However the high number of possible sources may actually prohibit the best use of the available information resources.

11. Historic houses are rich in historical information, related to the family and sometimes the world at large. This can be a largely untapped source as very few properties have developed an awareness of what they have and methods for storage and retrieval (See: 6.3 to 6.5.)

12. One of the key sources of information is the tacit knowledge of the person responsible for the historic house as noted in 6.5. Those properties that are privately owned exhibit this characteristic to a greater extent than properties run by English Heritage or the National Trust, and defer to their trusted sources as noted in 6.5. However even at other properties those responsible rely on their tacit knowledge as they are faced with an overwhelming amount of information to support their work. Their solution is often to make a phone call rather than use available information.

13. Despite an awareness of the importance of information, a lack of time and experience means that most rely on their tacit knowledge rather than spend valuable time developing their use of information (See: 4.4.) Their time is spent focused on protecting the historic fabric for future generations and this leads to them using their existing knowledge.
14. Exceptions to the reliance on local resources are reports that have been published (See: 7.1.) These affect properties nationally and usually have an impact on their environment. Government reports or guidance and developments for the sector will have an impact on their work and naturally they will refer to those that are appropriate to their situation. However it does not override their natural tendencies to use their own tacit knowledge and local sources as discussed in 6.5.

15. The fact that historic houses rely on their own tacit knowledge and their history of communication with others has a bearing on their access to resources. Being a part of the local economy leads them to use locally based resources and rely on them more than other sources, including the Internet as discussed in 7.1. This situation may change with future generations and the growth of technology. It will be important to ensure that individuals are trained in information literacy and IT, as noted in 7.3 and 7.4, to a greater degree to enable them to sift through the vast amount of information available.

16. Although many historic houses are now connected to the internet, their usage is limited and could be better developed (See: 7.3 to 7.5.) The development of web sites is an area of growth and expansion for properties.

17. Most properties do have access to the Internet, but there are widely differing ways in which it is used by each and the range of enquiries made (See: 7.2 to 7.3.) The busier properties, those that enjoy more visitor traffic, make more systematic use of the Internet to solve problems, however it is not clear that this is being undertaken by either trained information professionals or even if the staff undertaking this work have received some form of information literacy training. As in many cases, not particularly this sector, the pervasive nature of the web is assumed to be easy enough for anyone to extract the relevant
information from. Vastly improved results could be obtained with a small amount of support and guidance.

18. New and expanding areas of the Internet, such as e-commerce, will be of growing interest to historic houses. Marketing of properties and the availability of booking and purchasing solutions for visitors could have an impact on the activities of properties and their information needs in the future. This will require much more detailed professional support and is likely to lead to a more detailed need for information online (See: 7.4.)

19. Few properties use information professionals to help them with the use of the Internet or other information resources, however there is evidence to suggest that some are aware of the need for specialist information handling skills, yet they clearly did not know where to begin to get this help or support (See: 6.9.) Some properties, notably with more activities, and possibly more income, do use professionals, but these are few and far between and not always appropriately used; although they look after ‘libraries’ their skills could be further used to improve and educate the use of information at properties (See: 6.6.)

20. Historic houses are to an extent aware that professionals are available to supply and train people in the use of information. Some properties did ask for help and support, but did not know where to access this support as discussed in 7.4 to 7.5 and 8.3.2. Equally they also appreciate the need for information skills, but have not had the opportunity to acquire them or know where to go to get them.

21. Cost does not arise as a particular issue for those running historic houses. People are willing to pay for professional help to manage their information needs. They are concerned with getting value for their money, but the fact that there is a cost attached does not dissuade them from taking a particular approach as noted in 7.4 and 8.0.
22. Overall the picture of information use at historic houses is one of inadequacy (See: 6.6.) The situation is exacerbated by the amount of information and resources that are available. Both English Heritage and the National Trust provide a large amount of information that is accessible to their own managed properties, but are also available to other properties. This is one of the strengths of the sector, but also one of its weaknesses. The information available can solve any conceivable problem, but because there is so much information, most do not know where to start. This is not just related to those properties independent of organisations but even those who are a part of those organisations have difficulty making sense of the vast amount of information available. See 6.5 and 6.6)

23. The sector is made up of both amateurs and professionals which exacerbates the situation just discussed. Many property owners are fathers and mothers, husbands and wives, just trying to ensure that the property passes successfully from one generation to the next. They spend most of their time just living their lives, school, housekeeping and everything most take for granted (See: 4.1 and 4.2.) In addition they have a historic house that has been passed from generation to generation that has its own special needs. They will rely on their own tacit knowledge developed during their formative years and handed down from their parents. Other properties, particularly those run by English Heritage and the National Trust, have professionals available to support the properties. However those that are actually running these properties are not always professionals, but they do know where to go for the help they require, although there is a large amount of information that can be difficult for them to make sense of when faced with a problem to solve. However they do have access to conservators and other professionals that are not readily available to those looking after their home, who may have to spend considerable time searching for a specialist (See: 6.8.)
24. Historic houses do not use information as a means of solving their problems, but view it as an obstacle that has to be overcome to get to where they need to be (See: 6.7.) Many will rely on their trusted sources that have been relied on by themselves and generations that have preceded them. This will mean they rely on family solicitors, accountants or land agents, and other families that they have ties with through their own social networks (See: 6.5.) Their own tacit knowledge places value on these trusted sources which in turn makes them use these rather than more formal sources that may be available to them if they knew where to look.

25. Properties that are privately owned and run have their own knowledge base and rely on their own tacit knowledge. Some develop simple storage systems, such as a Rolodex, to store that knowledge as it is clear that once a provider for a solution, including things taken for granted such as plumbing, is found then it is highly prized (See: 6.5.) Maintenance of the property requires skilled services and once a provider is found it is held on to. Much of this knowledge can be gained from social networks which are often neighbours or locally based. This does not work in all cases as sometimes local competition for visitors does not produce the appropriate social networks (See 6.7.)

26. Experiences of obtaining information have been disappointing on a few occasions as noted by the research, which may also in turn lead those running historic houses to rely on their own tacit knowledge even further (See 6.9.) Most of their needs are obviously met as the research participants overwhelmingly thought that they had all the information that they required to run the property, although they still thought that that they could use it better than they are (See: 6.10.) This leads to the conclusion that they are not aware of how information can be managed and used more effectively or even what other information may be available to them.
27. Although historic houses do have written plans, either related to operational activities or to funding opportunities, no plans have been laid for the provision and control of information at historic houses (See: 8.3.1.) Access to information is available but there is no plan regarding its use and storage.

28. Collaboration is evident in the sector through many of the collaborative projects that can be seen involving partners, largely as a result of the influence of the Heritage Lottery Fund (See: 8.2.) This has resulted in a considerable number of new resources being made available in the sector that are of use to the wider community as noted in 8.3.1. However many properties are not aware of this collaboration and focus purely on the day to day running of their properties. Awareness of information resources is not high and usage is consequently low as a result in establishments.

29. Devising a complex theoretical solution to the problem is unnecessary and fraught with difficulties. The methods used to gain information by properties are simple and the model described in the methodology shows the route used by most historic houses, that of “trusted source”, which is the basis of their information seeking behaviour (See: 3.2.) The sector is diverse and work occurs across many different areas and any possible solution cannot be a panacea for all. However the problem is a generic one for historic houses, they all suffer from poor information usage, and it will require tailored solutions.

These conclusions have arisen from the investigation posed by the original hypotheses and are duly transcribed in Table 9.0 to indicate the relationship between them.
### Table 9.0 Hypotheses and Conclusions

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It can be said that historic houses, although generally cognisant of the importance of information, do not fully appreciate the role it can play in the running of their properties and how the management and use of that information can make their properties more effective and successful.
9.3 Recommendations

The empirical evidence from the study leads to recommendations that would improve the situation for historic houses. These are discussed under the following headings:

- Education;
- Policy;
- Audit;
- Co-operation;
- Access to resources;
- Technology.

9.3.1 Education

One of the key building blocks of having personnel that can manage historic houses effectively is to ensure that they have been adequately trained. Consequently if those managing properties have received appropriate training in the use of information then they can more effectively run their establishment. There are a number of ways in which this can take place.

Employ appropriate information professionals

Where possible historic houses could make use of information professionals and employ them to work at their establishments. There are a number of barriers to this simple solution. Firstly there is the cost of employing an information professional, many properties would not be able to afford to employ somebody in a full time capacity, although some have said that they would use an information professional on occasion if they knew where to get hold of one. There is a market here for information professionals to sell their skills and provide a service to historic houses. However it is difficult to quantify how much work is actually available in the sector.
Another aspect that needs to be considered is that some of the larger properties and some organisations do actually employ information professionals to look after their antiquities and their libraries which have been collated over time. However this role is limited and these professionals could be used in a wider capacity to help develop the systems available for managing information at these properties. Historic houses get the appropriate professional help to protect the heritage, in this case the library built over centuries, but do not use them to develop the use of information at the property. Developing the role of information professionals at properties or within heritage organisations, such as English Heritage would go some way towards improving the use of information at properties.

*Employ staff who are information literate*

Many of the staff who are working at historic houses are not information literate and have not acquired information literacy as a part of the educational process. Staff at historic houses that are carrying out the day to day running of the property are often not highly paid, quote often volunteers, and do not necessarily have the requisite information literacy skills required to take advantage of the information available to them.

The heritage sector is not seen as being of paramount importance when budgets are awarded. Whenever there are cutbacks the cultural and heritage sector are often the first to be affected. This means that grants might be affected and more reliance needs to be made upon volunteers. Historic houses rely heavily on volunteers anyway so it would be purely by luck that information literate staff might be employed. If information literate personnel are employed then historic houses may get a greater advantage from the information at their disposal. If information literate staff are already employed or are volunteers they might feasibly be used more effectively.

*Develop the information skills of existing staff*

Staff development programmes could be developed to enhance the skills of both volunteers and employees. User education programmes are common in the academic
sector and to some extent in the public library sector. This could be extended and developed for the heritage sector to make employees both information literate and information aware. Educating staff as to the value of information initially and then how to access the appropriate resources at their disposal, whether from a library, or other designated resource, would improve the efficiency and effectiveness of operations at historic houses.

The core of the problem is a lack of proper knowledge on the part of the staff on how to use information based resources which needs to be approached by introducing proper orientation of the tasks and skills required in the job. A proper orientation in the use of information as part of an induction programme would be of great benefit to historic houses. Some historic houses do have induction programmes, some of the larger ones, and this would be of benefit to the staff anyway in their performance in their roles, but incorporating information skills training into an induction programme would be of even greater benefit.

A sector wide programme could be developed that could be made available to staff. This would have to be managed by a central agency, such as English Heritage, to ensure that the content is valid and that the best value is derived from a programme. Historic houses have problems with a lack of time, so I would need to be delivered in an efficient manner. Although courses are available through the public library service many historic houses will not be able to take advantage of these as they may be at inappropriate times or simply do not offer appropriate content for the heritage sector, although they would offer experience in searching techniques. However a centrally organised programme developed by English Heritage in conjunction with academic institutions or the public library could deliver some worthwhile results for the sector. There are enough University departments that can deliver information training on a regional basis in conjunction with departments that provide training for the heritage sector, for example Leicester University, who deliver education for museums and Loughborough University who educate information professionals. These could be organised in conjunction with the national heritage bodies and information related
professional bodies. Additionally the ECDL (European Computer Driving Licence) programme, which delivers IT training, could be delivered to the sector with partners from further and higher education.

A programme that offered some solutions for those at heritage sectors would be welcomed. English Heritage is a source of information for many properties, whether owned by English Heritage or not, and consequently a course that helped provide guidance on the information that they provide would be welcomed. Other organisations could equally provide useful courses on how to use information at their disposal, including the National Trust and the Historic Houses Association. However a lead needs to be taken to make information skills training an integral part of training in the heritage sector. This is not an easy task as the large number of volunteers in the sector and the “odd” hours that they work throughout the week would require onsite cascade training of any provision made.

9.3.2 Policy

It was clear from the research that historic houses have developed little in the way of policies concerning their properties unless they have had to create a management plan in the light of grant conditions. Of those that have policies there is no reference to access and control of information within the policy. Consequently it would be of benefit to all properties if they developed information policies to support their operational activities and planning.

Developing a framework for the sector would drive the sector towards a more organised and more effective way of working based on better use of, access to and control of the available information. Again it would be incumbent upon a national organization to drive the creation of an information policy, which would mean English Heritage, although it could be seen by others in the sector that they are driving it for their own needs and for their own agenda, whether this is the case or not. English Heritage do sometimes suffer from the sector seeing them more as a police service rather than an
enabling force in the heritage sector. Any policy developed would still be owned by the DCMS (Department for Culture, Media and Sport) and would not in itself constitute a national policy for the reasons previously indicated regarding the view of Government organisations by the sector. The best way to make an impact in the sector is to provide examples of good practice that properties can adopt. The variety of activities and the differences between properties mean that no one policy would be appropriate for all. Having a model that can be adapted would be beneficial. It could include aspects such as:

- Metadata/cataloguing;
- Access to information resources (what, who and where to go);
- Disaster management (what, who and where to go).

This could even be linked to funding opportunities to “encourage” uptake from historic houses.

Policies exist for the development of the heritage sector and the organisations that are promoting the nation’s heritage, yet typically as in many other sectors there are no policies related to information and there is not even a nod towards the use of information in other policies. This should be addressed and historic houses should even adopt a policy for their property, not depend on the development of a national policy. This is unlikely unless a template is developed at a national level that can be easily understood and adopted at each property. This would have to be adopted in conjunction with an information literacy programme to ensure that personnel understood what is required from an information policy and additionally how to implement it using skills acquired through a training programme.

Future generations may have an advantage over the present one and may actually have developed information skills and a use of information technology through their own education, which could be beneficial to the running of their establishment in the future. Developing information policies would still require some guidance and this should be
prompted from a central heritage source, such as English Heritage. However the development of any policy should be driven by a recognised authority in the information sector in conjunction with the heritage sector to ensure that a robust and appropriate policy can be delivered and consequently implemented. Additionally representatives from different parts of the sector should be included as part of the development, to try and create ‘buy in’, from the different players in the sector, including private owners, the National Trust and the Historic Houses Association.

A policy should include:

- Information governance measures (Freedom of Information and Data Protection);
- Description of skills necessary;
- Standards to be used in the sector for the provision of information, including metadata and classification;
- Collection development measures;
- Use of information technology;
- Levels of funding;
- Minimum levels of qualifications and training;
- Levels of access to information resources, including nationally available and sharing of resources;
- Review levels of co-operation in the use of information;
- Information audits;
- Additional knowledge management measures;
- Guidance on implementation of policies at establishments.

9.3.3 Information Audit

As part of the development of information policies, historic houses should undertake information audits. Part of the knowledge management of an establishment this will require considerable planning and training on the part of both properties and heritage
organisations or the involvement of professional third parties from the information sector.

The scale of an information audit will be dependent on how it is to be approached and whether it is a single property or an entire organisation. If an individual property was to carry out an audit of its information and its use then they would take a huge step towards having greater control over their operations and would be able to make decisions more easily and faster than previously.

It would be an altogether different prospect if an organisation the size of the National Trust were to carry out an information audit. This would require a level of expertise that is only likely to be available from the information sector, so it would require a level of funding from the government and collaboration with professionals from different disciplines, including archives, records, management, personnel, restoration and conservation aspects.

Information audits require planning and take time to refine to produce the correct information that can be updated on a regular basis. A with all processes the initial audit will be a burden and would require additional finance and personnel to undertake. However once the initial process has been completed updating the audit would not require the same resource for the ongoing process. An information audit can be the precursor to defining a policy and strategy for the management of information at a historic house.

The information audit is not a simple process, unless the establishment has already undertaken the process, which is unlikely in the heritage sector. Support will be necessary to take them through the process from third parties, it may even be more beneficial if the process is carried out by an independent body whether on a fee based basis or otherwise.
The information audit will define the organisation or the property’s information needs and assets, the way the needs are met, how assets are created and how they are managed and used. As a result of this it will reveal:

- Blockages in the use of information;
- How information created;
- Where information is located;
- Gaps and duplication of information;
- Quality and impact of the information;
- How information is managed to meet legal obligations;
- Effect of technology;
- Effect of organisational culture;
- How information managed to meet the organisation’s objective.

Discovering these aspects of information would enable the defining of policies and strategies to improve the management of information and help to meet the historic house’s objectives more effectively. Key aspects of the research indicate that information audits would help historic houses improve their management of information. Culture is a key aspect, properties use tacit knowledge passed from generation to generation, which in turn leads them to trusted sources, which they know. However properties do not know how to locate new information or how it is created. Lack of control of property based resources leads to gaps in knowledge so that it can be difficult to contact specialists in some areas. The increase in Internet use and IT is taken advantage of by historic houses, so the effect will change in the future. The lack of management of information at properties, often due to the nature of those running properties, would help to remove blockages, remove gaps and improve the quality of the resource, making it easier meet legal and other obligations.

An audit is a knowledge management process and requires considerable planning to ensure that the end result was worth the organisational input that would be required to make the process a success. The information audit provides a framework through
planning, data collection; data analysis, data evaluation, communication of outcomes and the implementation of outcomes. The final stage of the framework, as has been indicated above is that of an ongoing process of matching the delivery with the needs. The framework is derived from the business objectives of the historic house which will ensure that the mission of the sector is uppermost during the audit process.

9.3.4 Co-operation in the sector

There is an impression that historic houses do not see themselves as a sector and as such this will make collaborative activities less likely. The drive for solutions would appear to have to come from national bodies rather than the sector looking for collaborative solutions to problems. There is a level of co-operation in the heritage sector, but it is not always seen as a partnership by the participants. As already indicated English Heritage is sometimes seen as a restrictive, formal organisation that regulates activities and is not always helpful. The resources that they hold are considerable and can and do help a number of historic houses, from their own resources and those that are independent. There is doubt whether it is possible to remove the stigma that is often attached to Government related organisations, but that does not mean that the organisation cannot be a focus for co-operation in the sector.

English Heritage already forms a focus for projects that are related to restoration and conservation. They have also helped to focus attention on datasets that are useful to those working in the sector. There are other bodies that could also help at a national level, but which currently seem to operate independently; the Historic Royal Palaces for example must have a wealth of expertise that might be shared with others. However there is a need for a more basic level of support related to access and the use of information resources within the sector.

Co-operation between historic houses can be beneficial in many ways. As with co-operation with libraries sharing resources and creating networks can actually save money and make some information services viable. It is not that simple in the heritage
sector, but there areas that could help historic houses. There are now available datasets that provide information for the sector, but how many properties are aware of them and would know how to make the best use of them. Promoting these appropriately and providing some form of guidance would help to boost use of these materials. Additionally there will be useful information resources that are not generally available within the heritage sector that would be of benefit to the whole community. This would take considerable organisation and collaboration, as there is not a level of trust that exists within the library and information sector, to ensure that something is produced. There will be information resources that might be digitised to the benefit of all, but it would need the organisation of a body like English Heritage and the backing of the government in some cases or shared funding from a number of bodies.

Joint marketing activities take place when selling the heritage sector to the public which is relatively successful; however it’s not seen as important when it comes to informing those within the sector of important information. There are membership magazines, such as those produced by the Historic Houses Association, which inform members regarding tax related and other important issues. However although raising current issues, ready access to information when it is required is a different need and having access to the what, how and when of information requires more organisation.

To make the sector more effective co-operation needs to be created in the form of:

- A body to drive the development of information related activities across all organisations and historic houses derived from said same;
- Co-ordinated units that will ensure that any developments reach those that they are intending to help;
- A joint group of any existing information professionals in the heritage sector, whether from establishment libraries or other activities, which could be utilised to advise lead and implement changes.
Some of these are big things to ask in the sector, it is unlikely that a body that was representative of all of those that operate in the sector could devise and develop information related projects in the current climate. There is not enough money available along with other heritage priorities to drive a project of that size, however it is possible that smaller projects could take place to create and instil best practice in the management of information for historic houses. Using smaller groups, such as a group of information professionals already involved in the sector may provide the beginnings of good practice, but on a more restricted budget. Informal groupings that exist in the sector, at local, regional or national levels, could be used to identify and share problems to the benefit of all.

9.3.5 Access to resources

Historic houses have indicated that there are times, although relatively few, when they would like to be able to consult with a trusted source for information that will help them with the maintenance of their properties. There are resources out there that can help with this but it is clear that properties are unaware of them. This requires that the perennial problem that haunts information work, informing users about the availability of resources that are available to them. This is always difficult and relies on communicating with the community.

This can be done, as suggested above, through the training of those in the heritage sector through information literacy courses. It can also be done by communicating through:

- direct mail;
- heritage groups that have come together to support each other at a local or national level;
- the internet;
- Email.
Using these methods of communication could help to inform those that are not aware of what is available to them. However there is a need to provide some resources that are more clearly aimed at historic houses, and more importantly are communicated to them. Some of the information they need to access is already available, but it needs repackaging into a form that they can easily understand and access. Online resources, such as a digest of trusted or acknowledged repairers or restorers that are known for their work on historic houses, would be welcomed by those running activities at properties. There will be other useful information that could be put together, including useful business oriented information that SMEs might also covet, which should be put together in a heritage portal.

To be useful to the sector it would have to be driven by a body that was representative of the sector, which would require involving a number of historic houses and organisations. Additionally it would need to be driven by a body with enough expertise and impact in the sector, such as English Heritage. What might be appropriate, and may also remove the stigma that some have attached to English Heritage, is to have them lead a project that pulls together information in a portal and then makes it available to the sector in some agreed manner. In this way they could act as JISC might do in the education sector and gain credit for their expertise and achievements, which might reduce some of the negative feelings towards them from others in the sector.

9.3.6 Technology

As part of developments in the heritage sector the use of information technology must rank highly as one of the main ways that information can be more effectively distributed and used. Most historic houses surveyed had access to the Internet, so there is not necessarily a reluctance to use information technology; however it is an unfamiliar way of working and many do not use it appropriately. Rather than use it as a tool to improve their access to information resources and to make the most efficient use of resources available to them they are merely using it to book holidays or buy books as would any normal household.
This is not unsurprising as many properties are exactly that, family homes, being run by those that are also trying to raise a family while doing a job, but still having to maintain their “stately pile”. It is also partially a generational issue, as some of the older generation who believe that the use of modern technologies are beyond them are also confident that the next generation will have a firm grasp of new technologies and will use the Internet more effectively and be more dynamic in its use. However, much of the future use that they perceive for their establishment that would be delivered via the Internet is often related purely to marketing aspects of the property. They feel that the Internet will enable them to make details of their property available to a wider audience and bring more visitors in. This is one good use of the Internet but the management of information and access to useful information resources is not wholly considered.

Introducing those responsible for running historic houses to new technologies and the use of information resources would need to be delivered as part of the programmes noted above in 10.3.1. This could be aimed at both the heritage sector and if thought appropriate could also be delivered at different generational levels. There is a general belief that those who are going through the educational process now and who have technology taught as a part of the curriculum should have a better grasp on the use of the technology and in some cases they will also be information literate to some degree. However it is dangerous to make too broad an assumption as there are always those that have different styles of learning or who are less technically minded than others who will need more support, so this has to be borne in mind.

Guidelines could be drawn up that might support historic houses in introducing new technologies and know who to contact to make the best use of new technologies at their property. This might range from simply using the Internet to best advantage or might go further in using mobile technologies to provide interactive tours or other facilities at the property. There are many options but guidance would need to be provided for historic houses as this would ensure that the work is not being repeated across the sector. English Heritage, the National Trust and some of the leading larger properties have already introduced technology to improve access to information and facilities, but
this needs to be more widely available across the sector to provide equal access to
assets of historical attitude across the United Kingdom for the public, ensuring that
education and a love of the past is engendered in future generations.

Improving the use of information technology would enable the improvement of
establishments’ information systems for the storage of their own information assets and
would support the introduction of policies and strategies that will enable effective
management of their information resources.

9.4 Recommendations for further research

Since this is the first study which investigates the information needs of historic houses
the researcher believes that it would be beneficial if other specific areas will provide a
more extensive vision of what is taking place in the heritage sector regarding
information proviso and management. The following areas of investigation are
therefore suggested:

• An evaluation of the differences that exist in the use of information sources and
  the management of information between historic houses that vary in size,
  location and other factors:

• A comparative study of the availability of information services in the heritage
  sector between the UK and Europe and also possibly the USA;

• A study of the available information in the sector, including databases and
  resources that have been developed with considerable funding, how much use
  they are receiving and by whom;

• A study of funding possibilities for developments in the arena of information
  management in the heritage sector;
• Undertake information audits in selected historic houses to determine if best practice guidelines can be developed for use across the sector;

• Examine existing policies to determine the structure required for an information policy and the management of knowledge at historic houses and organisations;

• A review of best practice of information technology and how it might be used more appropriately and effectively within historic houses;

• An investigation into the role that national organisations can play in the provision of information to historic houses.

As this study has revealed, research regarding the information needs and the management of information at historic houses has been limited; it is also clear as a result of the study that to address the issues relating to information at properties sectoral wide support would be beneficial. Awareness of the importance of information and its management needs to be addressed in the heritage community to ensure that information receives the appropriate level of acknowledgement by all owners, custodians and administrators. Direct funding to improve the flow and dissemination for historic houses would be beneficial; funding for developments related to the provision of information and training could lead to significant developments and improvements for historic houses. In addition the enabling of appropriate networks across the community, either using available funding or through the re-imagining of existing connections, could lead to the spread of good practice and improved information management.
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Appendix I
SURVEY OF INFORMATION NEEDS OF HERITAGE ESTABLISHMENTS

I would be very grateful if you could take a few minutes to complete this survey as the results will provide information that will help establishments manage their information more effectively in the future.

The aim of this questionnaire is to gain some insight into the information needs of heritage establishments. Establishments will use a wide range of information in their day to day operations. It is the extent of this information use that I am trying to gauge and the range of activities that require information to support them.

If you would like more information or clarification then please do not hesitate to contact Alan Brine at Loughborough University on 01509 223078 or by email at a.c.brine@lboro.ac.uk.

Section I About Yourself

1. Which of the following best describes your main areas of work? (please tick all that apply)
   - Budgeting
   - Insurance
   - Security
   - Customer relations
   - Liaise with other bodies
   - Surveying
   - Education
   - Maintenance
   - Staffing
   - Grant Aid
   - Marketing
   - Strategic planning

Other - please describe
........................................................................................................................................
........................................................................................................................................

2. What is your main role or job title, in relation to Question 1? (please tick one only)
   - Estate/property manager
   - Owner
   - Site administrator

Other - please describe
........................................................................................................................................

Section II About Your Establishment

3. What is your establishment’s name?
4. Which of the following best describes activities at your establishment? (please tick all that apply)

- Catering
- Education
- Forestry
- Parkland
- Conservation/Preservation
- Events
- Gardens
- Play areas
- Corporate Hospitality
- Farming
- Merchandising
- Visitor Management
- Other - please describe

5. Does your establishment obtain, share or exchange information with any other organisations? (please tick all that apply)

- Ancient Monuments Society
- Association of Leading Visitor Attractions
- British Tourist Authority
- Cadw
- Campaign for the Protection of Rural Wales
- Civic Trust
- Council for the Protection of Rural England
- Country Land and Business Association
- Countryside Agency
- Countryside Recreation Network
- Dept. of Culture, Media and Sport
- Dept. of Environment, Food & Rural Affairs
- English Nature
- England’s Tourist Boards
- Farming and Rural Conservation Agency
- Heritage Lottery Fund
- Historic Gardens Foundation
- Historic Houses Association

- Historic Royal Palaces Agency
- Historic Scotland
- National Farmers Union
- National Gardens Scheme
- National Rural Enterprise Centre
- National Trust
- National Trust for Scotland
- Parish/district/county council
- Resource*
- Scottish Tourist Board
- Society for Protection of Ancient Buildings
- Treasure Houses of England
- The Tree Council / Woodland Trust or other
- Union of European Historic Houses Assoc.
- Volunteer organisations
- Welsh Tourist Board
- Wildlife Trusts

Other – please describe

*(Resource was formerly known as the Council for Museums, Archives and Libraries)*
6a. Is your establishment a member of, or linked with, any of the following? (please tick all that apply)

- Cadw/ English Heritage/ Historic Scotland
- Local Authority
- Historic Houses Association
- National Trust/ NT for Scotland
- Historic Royal Palaces Agency
- Treasure Houses of England
- None

Other – please describe
........................................................................................................................................

6b. Does the organisation that you ticked in 6a provide you with information, which can be used in the running of your establishment, by providing a library, or other form of information service?

- Yes
- No
- not applicable

Please give details:
........................................................................................................................................
........................................................................................................................................

7. Do you have access to specialist information at your establishment or from other sources, such as any organisation in which you or the establishment is a member, or an advisor?

(note: specialist information may include preservation techniques, taxation help)

- Yes
- No

If yes please indicate where from (e.g. organisation regional office or other local committee/contacts)
........................................................................................................................................
........................................................................................................................................

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Section III About Information in your Establishment

7. Where is information about your establishment kept? (please tick all that apply)

- Own library on-site
- On-site, but in different locations
- Larger organisation of which the establishment is a member

Other – please describe
........................................................................................................................................

8. What types of information do you require to run the establishment? (please tick all that apply)

Management (Information used in day to day operations)

- Catering
- Estate Inventories
- Financial
- Maintenance
- Events
- Personnel
- Legislation
- Transport

Public (information to inform others)

- Educational
- Marketing

Research (information used to solve problems)

- Surveys
- Preservation
- Conservation

Please add any other type of information not included above or clarify any ticked if inappropriate in your establishment’s situation:
........................................................................................................................................
........................................................................................................................................
9. Information may be stored and used locally, or at regional and national level by organisations of which the establishment is a member. Please indicate where you make use of each of these? (please tick all that apply)

<table>
<thead>
<tr>
<th>Local</th>
<th>National</th>
<th>Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Paper based files (e.g. inventories)</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Published reports (e.g. guidelines)</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

Other - please describe

........................................................................................................................................
........................................................................................................................................

10. Does your establishment have access to the Internet?

- Yes
- No

Section IV How you use information

11. Please tell us how often you use the following when using information in your work:

<table>
<thead>
<tr>
<th>Never</th>
<th>annually</th>
<th>monthly</th>
<th>weekly</th>
<th>daily</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and Periodicals</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Manuals</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Film/video</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
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<tr>
<td>CD ROM</td>
<td>o</td>
<td>o</td>
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<tr>
<td>Internet/WWW</td>
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<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Local database</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Electronic mail</td>
<td>o</td>
<td>o</td>
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<td>o</td>
</tr>
</tbody>
</table>

Other - please specify

........................................................................................................................................
12. Have you ever encountered any difficulties in obtaining information? (please tick as applicable)

- No  (If no, please go to question 15)  - Yes  (If yes, please tick all of the following that apply:)

- Material in an inaccessible location  - Locating material
- Arrived too late to be of use  - Too expensive

Other - please specify


13a. Do you think that you have enough information available for the successful running of the establishment?

- Yes  - No

13b. If No what information do you lack?

Please describe:__________________________________________________________


14. Would you like to comment on any ways that might help you find and use information, either at your establishment, or by other heritage organisations providing you with information.


15. How many visitors does your establishment receive per year? (optional)
Thank you for your time and assistance

Please return this form by 21st December 2001, in the envelope provided to: Alan Brine at the Department of Information Science, Loughborough University, Loughborough, Leics. LE11 3TU. Tel: 01509 223078 Fax: 01509 223994

After the results of the survey have been analysed a number of establishments will be approached to act as case studies. This will consist of a short interview, which would take place at your establishment. Please indicate if you would be willing to participate in this stage of the research, by providing your contact details below.

Name: ......................................................................................................................
Address: ...................................................................................................................
............................................................................................................................
E-mail address: ........................................................................................................
Appendix II

Categories of Interviewees for the case studies

Interviewee A: Owner, privately owned property with a small number of visitors in Scotland.

Interviewee B: Owner, privately owned property with a small number of visitors in England.

Interviewee C: Manager, privately owned property with a large number of visitors in England.

Interviewee D: Custodians, property run by a heritage organisation with a large number of visitors in England.

Interviewee E: Custodian, property run by a heritage organisation with a small number of visitors in Wales.

Interviewee F: Manager, property run by a local authority with a medium number of visitors in England.

Interviewee G: Custodian, property run by a heritage organisation with a large number of visitors in England.
Appendix III
HERITAGE ESTABLISHMENT INTERVIEWS

The aim of this interview to gain some insight into the information use within the establishment. It is intended to find out what information is produced by other organisations and how it is made available to those working at properties. It is the extent of the information available, how it is organised and how delivered to managers to support activities at properties that must be discovered. Gauging the range of activities that require information to support them will also help to confirm data gathered from the survey.

Organisation’s name

About Yourself

1. What is your main role and job title?

please describe

How is information used?

2. What areas of activity at the property require information?

Wait for responses to see what activities are mentioned.

Prompt list 1 for further discussion

Add any other types of information required for house activities:

3. How are these used in day to day operations? i.e. what sources are used for any/all of these i.e. named Inland Revenue guides for financial, manuals from heritage organisations?

(List as many sources as possible by observation and/or discussion).

Prompt list 2
4. Does the property have plans for the year’s operations and/or activities? (business plan?)
Yes/No

a) What are the main features? (Do not prompt at first, to judge the level of understanding of question i.e. level of strategic direction)

Prompt list 3

b) Is it integrated into other activities (or policies) in the organisation? If so which?

c) Does it include the provision of information to members of staff to carry out their jobs?

   If yes, what does it say?
   If no is this stated anywhere else?

d) Is this written down anywhere? (Can I see it? Ask to see now to avoid being forgotten later). What is it known as by you? (information policy?)

5. When information is required where do you get this from?

Prompt list 4 (If so which organisations?)
6. How is this information made available to you?

Prompt list 5

7. How much information do you get via the Internet? *(percentage if possible)*

What sort of information? *(i.e. handbooks, google search, contacts etc.)*

8. Do you get material to help in the management of the estate (property) from another organisation?

If yes, who?

a) What form does this take? *(e.g. manuals)*

b) Who provides this in the organisation?

c) Do these guidelines mention information? *(where it can be obtained, how to organise etc.)*

9. Do you share or exchange information with any other properties, organisations or specialists?

Prompt list 6

What form does this take?
About information at the property

10. Have you encountered any difficulties getting information? Yes/No

Prompt list 7

11. Are there any plans at the property to develop its use of information? If so what are these? (i.e. access to, storage of, use of)

12. Are there any ways that you think might improve the provision of information at the property? (This may be at the property or from external organisations)

13. In your opinion do you get adequate information to operate efficiently and effectively?

Yes/No (comment?)
14. In your opinion does the property use information to best advantage in its operations?

Yes/No (comment?)
### Prompt List 1

**Management** (Information used in day to day operations)
- Catering
- Estate Inventories
- Financial
- Maintenance
- Events
- Personnel
- Legislation
- Transport
- Products

**Public** (Information to inform others)
- Educational
- Marketing

**Research** (Information used to solve problems)
- Surveys
- Preservation
- Conservation

### Prompt list 2

- Electronic resources *(e.g. database, Internet)*
- Paper based files *(e.g. inventories)*
- Published reports *(e.g. guidelines, manuals)*
- One to one support *(e.g. phone)*
- Other – describe
Prompt list 3

- strategy (future directions)
- operational plan (activities)
- plans for implementation

Other areas within these categories:

- International liaison
- national liaison
- storage of information
- Internet
- audits
- information required by property
- staffing required
- activities needing info
- Information Technology
- Marketing
**Prompt list 4**

<table>
<thead>
<tr>
<th>Library or other form of information service for properties from a Heritage organisation?</th>
</tr>
</thead>
<tbody>
<tr>
<td>o <strong>Accountants</strong></td>
</tr>
<tr>
<td>o <strong>Advisors</strong></td>
</tr>
<tr>
<td>o <strong>Local authorities</strong> (Which part i.e. museums service)</td>
</tr>
<tr>
<td>o <strong>Trade Body</strong></td>
</tr>
<tr>
<td>o <strong>Agencies</strong> (i.e. Resource, Heritage Lottery Fund)</td>
</tr>
</tbody>
</table>

**Prompt list 5**

<table>
<thead>
<tr>
<th>Library or other form of information service for properties from organisation?</th>
</tr>
</thead>
<tbody>
<tr>
<td>o <strong>Yes</strong>  a) Is it centrally located or dispersed throughout the organisation?</td>
</tr>
<tr>
<td>o <strong>No</strong>   b) Does another part of the organisation have some responsibility for information? (<strong>e.g. marketing</strong>)</td>
</tr>
</tbody>
</table>

**Other:**

| o **Magazine** |
| o **Manuals** |
| o **Guidelines** |
| o **Books** i.e. on tax |
| o **Internet** i.e. database |
### Prompt list 6

<table>
<thead>
<tr>
<th>Association of Leading Visitor Attractions</th>
<th>Historic Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Tourist Authority</td>
<td>Historic Royal Palaces</td>
</tr>
<tr>
<td>Cadw</td>
<td>National Trust</td>
</tr>
<tr>
<td>Countryside Agency</td>
<td>National Trust for Scotland</td>
</tr>
<tr>
<td>Dept. of Culture, Media and Sport</td>
<td>Resource</td>
</tr>
<tr>
<td>Dept. of Environment, Food &amp; Rural Affairs</td>
<td>Tourist Boards</td>
</tr>
<tr>
<td>English Nature</td>
<td>Treasure Houses of England</td>
</tr>
<tr>
<td>English Heritage</td>
<td>Union of European Historic Houses Association</td>
</tr>
<tr>
<td>Heritage Lottery Fund</td>
<td>Historic Houses Association</td>
</tr>
</tbody>
</table>

Other – please describe

### Prompt list 7

- no Internet connection
- too much information
- don't know where to go
- cost
- not aware of any
- other