

## Instrument Management and Maintenance Policy

This document outlines the approach of Hertfordshire Music Service (HMS) in managing and maintaining musical instruments whilst ensuring alignment with the National Plan for Music Education (NPME) and the needs of Children and Young People (CYP) in Hertfordshire.

HMS currently owns approximately 10,000 musical instruments. As the recently re-appointed Hub Lead Organisation for Hertfordshire, we will also be investing in additional instruments, equipment and technology through the Capital Grant which will be held by us as per our appointment but remain the property of the DfE as per the conditions of the Capital Grant funding. Our policy will address how we will distinguish between existing HMS stock and what will effectively become 'Music Hub' stock.

The NPME aims to enable all children to experience music education through learning to sing, play an instrument or otherwise make music together. Collaboration, inclusivity, and sustainability are essential pillars to the NPME, and we hope to reflect these values in our instrument management and maintenance policy.

### Objectives

- Provide CYP with affordable access to a diverse range of high-quality musical instruments
- Identify opportunities to get underutilised instruments into the hands of young musicians, supporting regular music making
- Maintain instruments to a high standard to support effective music education
- Commit to responsible and strategic procurement informed by needs analysis
- Ensure sustainable practice by tracking asset depreciation and ethically disposing of or donating damaged stock

### Inventory Management

We are developing an inventory management system through Microsoft Lists, which will be integrated with Power BI. In its first iteration the system will focus on instrument quantity, location, and availability (i.e. whether is currently on loan to an individual or otherwise readily available), before progressing to analyse instrument value and condition.

HMS uses SpeedAdmin as its primary software for handling customer queries, tuition, and fees. The software also has the means of inventory management, providing us with a general overview of our stock. However, the reliance on manual data input from various stakeholders has led to complications including duplicate instruments, a non-standardised value system, and an inaccurate summary of our instrument stock. Our new system addresses this by providing a centralised, up-to-date overview of our current inventory.

This will allow for more joined-up thinking with regards to instrument allocation, maintenance, or repair. For instance: if a violin is in vital need of repair, but there is another violin in good condition in another location, it is more efficient to offer to exchange the

asset than to wait for repair. The broken violin can then be assessed on whether repair is viable in due course, causing minimal interruption to an individual's learning experience.

This will also inform strategic procurement with regards to instruments and equipment. By maintaining an accurate overview of all stock, we will be able to recognise and anticipate gaps in provision, with a view to improve the accessibility of our instruments. In addition to our centralised inventory, we will maintain a detailed register of all equipment purchased through the Capital Grant for Musical instruments, equipment, and technology through the Register of Assets document provided by the DfE.

### Storage and Insurance

In Summer 2023 HMS deployed funds that were generously provided by Arts Council England towards the repurposing of an office facility into an instrument storage space. This includes over 700sq ft of static racking and roller racking. In Spring 2024, a separate capital grant funding enabled us to replace single glazed windows with more efficient double glazing, or otherwise walling off entire sections. This space is secured, with access limited to relevant members of staff. This has provided us with a secure and energy efficient storage solution in the centre of Hertfordshire, allowing us to store a significant portion of our stock. Our intention for this space is to house the stock most in use to ensure such stock is readily available and accessible from a central focal point.

Our Music Centres based throughout Hertfordshire provide further storage capacity. This allows us to increase the accessibility of instruments throughout the county as well as reducing the burden on our Central storage. Efforts continue to improve the security and organisation of these additional locations.

A significant number of instruments stored at our Central storage facility are in need of service, damaged, or otherwise unsuitable for classroom use. We are currently exploring a potential partnership with Essex Music Hub to share a portion of a secure warehouse location. By securing this additional space, we intend to move damaged and disused instruments and equipment away from our Central storage facility, freeing up space for stock that is in good condition and readily available for use.

With regards to Insurance, Hertfordshire County Council (HCC) provide all-risk cover for instruments that are in school premises subject to a £500 excess. Whilst stored at HCC property, instruments will be covered for damage by fire, lightning, explosion, and riot & civil commotion. Where instruments are no longer stored on HCC or school premises, i.e. on loan to an individual, we have designed robust hire agreements outlining a hirer's liability, with a strong recommendation to insure the instrument.

### Valuation – Condition and replacement cost

Once we have a thorough understanding of our inventory, we will progress to analyse the value of our musical instruments. This will reflect Market value and Trade value, which can be provided from a general overview of stock, and Current depreciated value, which will be individually considered in response to an item's condition.

**Market Value (MV)** – General retail value of an item. This figure would be used for insurance purposes.

**Trade Value (TV)** – Cost of purchasing an item through trade and educational discount. This figure would be beneficial with regards to procurement.

**Current Depreciated Value (CDV)** – Value of the item with consideration of its current lifecycle stage and condition. This would be used to track our financial impact as both a Hertfordshire Council service and as a Music Hub.

Each instrument’s condition will be evaluated before it is assigned an alphanumeric code to indicate its current lifecycle stage:

A+	A1	A2	B	C	D1	D2
BRAND NEW	EXCELLENT	GOOD	ACCEPTABLE	LIMITED	REPAIR	DISPOSE
Item has not been used.	Excellent functional and visual condition.	Good functional condition but has superficial damage.	Good functional condition but significant light damage.	Item’s condition is impacting functionality.	Significant structural damage impacting safe use of item.	Repair is no longer viable.

## Evaluation

When evaluating condition, it’s important to provide a level playing field. In the first instance, the HMS Instrument Team will complete evaluation. This will allow us to develop and trial a formal process before the process is introduced to the broader work force of HMS.

The primary function of the evaluation process is to assess the playability of the instrument, but it will also allow us to recognise the depreciation of an instrument. The process will differ depending on the instrument. This is to acknowledge that certain damage may not impact playability, depending on the instrument. For instance, a small dent may not impact the playability of a tuba quite as drastically as it would a flute.

Similarly, the process will acknowledge the build quality of the instrument. If we compared a superficially damaged high-value violin to a brand-new student-level violin, for example. Despite the damage, it may be more beneficial for a student to learn on the high value model, and it’s value may still exceed the value of the brand-new student-level model.

## Damaged stock – Protection and sustainable practice

In a music service for children and young people (CYP), instruments can sometimes be damaged beyond repair. In response to this, we have implemented robust hire agreements that will secure the replacement value of instruments in the event of damage, theft, or loss. This includes outlining the responsibility of the hirer and a strong recommendation of insuring all loaned equipment.

However, when an instrument is no longer in a viable condition, we will aim to repurpose, donate, or ethically dispose of the instrument whilst acknowledging the financial impact on

our service. For example, the disposal of a £500 cello that is damaged beyond repair would not represent a £500 loss. Instead, this may be closer to 10-25% of that value.

In accordance with the NPME, we are exploring strategic partnerships to sustainably offload stock that is no longer viable for use. In the past, we have partnered with companies such as Electric Umbrella, who repurposed broken instruments into bespoke furniture items sold in support of SEND tuition and musical participation activities. Unfortunately, Electric Umbrella ceased trading in March 2024, so we shall continue to explore options that offer a similarly sustainable solution. Examples include Norman's Musical Instrument's Re-Tune initiative, who offered to refurbish instruments for donation.

### Maintenance and Repair

An effective maintenance and repair process will help to extend the life of our instrument stock, maximising its value to the service. Since instruments are often damaged during use, having an internal solution to fix them quickly and efficiently ensures that enough instruments continue to be available for CYP in Hertfordshire.

HMS does not currently have capacity to formally provide an in-house repair solution, so maintenance is completed reliant on the availability of teaching staff and their expertise. We shall continue to refine this approach to make the most of the expertise available to us whilst also equipping ourselves better for when we can provide a more thorough solution. This may take the form of an instrument apprentice, or through CPD to improve awareness of instrument management to the broader workforce.

Providing our teaching staff with CPD in basic maintenance may prove to be a cost-effective, short-term solution whilst providing an opportunity to embed the importance of instrument maintenance and set a standard for how often an instrument should be assessed.

This training may include cleaning and repair protocols such as:

- Ensuring wind instruments are dried with a clean pull-through after each use
- Regularly lubricating brass instruments before each lesson to prevent seizing
- Basic setup principals for stringed instruments to prevent intonation issues

As our instrument department remains in-development, we recognise that instrument maintenance and repair is an area that needs improvement. As we continue to progress, we will move towards establishing schedules for routine maintenance, repair logs for high value instruments and annual servicing for wind instruments to ensure an instrument's condition does not hinder the musical development of aspiring musicians.

### Purchasing – Needs Analysis and Strategic procurement

As our focus will be meeting the requirements of the NPME, our strategy for procuring instruments through funding such as the Capital Grant will be heavily influenced by thorough and ongoing needs analysis.

For example: a lack of adapted/adaptive instruments represents a significant gap in our current instrumental provision. However, we do not believe that impulsively buying a variety of adaptive/adapted instruments will truly meet the needs of CYP with SEND and

others in need of accessible instruments. Instead, we will collaborate with teaching staff experienced in teaching those with SEND to help identify the instruments that will have the most lasting impact to these students. This will also be supported through data collection and analysis of trends.

This represents the ethos we will adopt when deploying the capital grant and will be reflected across various gaps in our provision. Rather than simply seeking the most cost-effective solution to a problem, we will be guided by the needs of our services users and the expertise of our broader workforce.

We believe that this strategy will allow us to best utilise the Capital Grant for Musical Instruments and in doing so will diversify our portfolio of instruments, thereby increasing accessibility and aligning with the requirements of the NPME.

Looking beyond the scope of the Capital Grant, we are keen to develop our own internal purchasing framework. This will take inspiration from the DfE’s Framework for Musical Instruments, Equipment and Technology, but allow us to identify smaller, more local suppliers that will promote and sustain the supply of musical instruments in Hertfordshire, as well as allowing us to forge further strategic partnerships.

#### Current Inventory owned by Hertfordshire County Council as of Aug 2024

Category	i.e	Total
Brass	Trumpet, Trombone, French Horn, Tuba	1201
Guitar	Electric, Acoustic, Bass, Ukulele, Classical	1577
Keys	Digital Piano, Upright, Baby Grand, Harpsichord	219
Orch. Perc	Timpani, Tam-Tam, Marimba, Xylophone	53
Perc.	Djembe, Digital Drum Kit, Cajon, Congas	737
String	Violin, Viola, Cello, Double Bass	1274
Wind	Flute, Oboe, Bassoon, Saxophone, Clarinet	954
	<b>Total</b>	<b>6015</b>

This inventory was completed by the HMS Instrument Manager between July and August 2024. This took account of instruments currently owned by HCC that are stored at our four leading music centres, our central storage facility, as well as instruments currently on loan to schools / individuals.

We anticipate that our grand total of instrumental assets will continue to grow as both investigation and inventory efforts continue. We believe that this total will be closer to 10k from the 6015 identified at this time.

A significant portion of this stock will be stored at our additional HMS Music Centres. This will be identified through stocktake completed towards the end of Autumn Term 24/25.

We also anticipate that, during our service's migration from Paritor to SpeedAdmin as well as disruption caused by COVID-19, records of several instrument loans may have been lost. To amend this, we will work with our broader teaching force to identify potential HMS assets that remain in circulation.

In addition to musical instruments, our service also owns music-related equipment and accessories including music stands, audiovisual equipment, and hardware, as well as a significant library of sheet music.

Our understanding of all music assets will remain in development, but we are committed to remain able to distinguish and identify HCC assets purchased prior to the capital investment, and all project assets which will be purchased and held by our Music Hub.

### The Capital Grant and ongoing Inventory Management

In the event that HMS is no longer the Hub Lead Organisation for Hertfordshire, the terms and conditions of the Capital Grant for Musical Instruments, Equipment and Technology specify that Project Assets are subject to transfer to another organisation that is to carry out the agreed use.

To address this, we will closely monitor all instruments purchased through capital grant funding via the Register of Assets provided by the DfE. In addition to this, we will acknowledge instruments purchased through this channel with an identifying code, unique from our existing asset numbering system. When conducting future stocktake, all project assets will be treated unique to existing stock and identified through subcategory – i.e 'Hub Owned'.

By maintaining record of purchase and location of each project asset, we will be able to identify where instruments are, obtain proof of existence and transfer to another organisation where required.

Separate to the investment of the Capital Grant, HMS is due to update its existing Musical Instrument framework agreement in summer of 2025. Whilst capital investment will be made through the DfE's framework during academic year 24/25, the existence of an additional HCC-owned framework will allow us to separately monitor instruments purchased through alternative funding streams.

### Summary

This Instrument Management and Maintenance Policy outlines a comprehensive approach to managing and maintaining in excess of 10,000 musical instruments owned by Hertfordshire County Council, whilst also considering the deployment of the Capital Grant for Musical Instruments, Equipment and Technology and the conditions set out by the Department for Education.

Whilst instruments purchased through the Capital Grant investment will be held by Hertfordshire Music Service as Music Hub, they will remain subject to transfer to another organisation that is to carry out the agreed use. HMS will maintain a Register of Assets of all instruments, technology and equipment purchased through the Capital Grant funding, and

will continue efforts to ensure all physical assets are stored securely or otherwise protected through insurance and robust hire agreements.

Through inventory management and ongoing needs analysis we will understand the minimum stock levels required to meet the needs of Hertfordshire residents. This will allow us to not only align the supply and demand of our Music Hub, which is a vital component of the National Plan for Music Education, but engage with procurement strategically, providing demonstrable benefits to the residents within our Music Hub area.

Hertfordshire will act sustainably by developing our means of repairing and servicing instruments in-house, thereby extending the lifecycle of each instrument, maximising value from our investment. In addition to this, we will explore strategic partnerships to sustainably offload stock that is no longer viable for use in our service.