

Commgbittee: COMMUNITY & LEISURE COMMITTEE

Agenda Item

Date: 12<sup>th</sup> October 2005

**7**

Title: **DRAFT MUSEUM SERVICE FORWARD PLAN:  
INTERIM REPORT**

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Item for information

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## Summary

The Museum Service requires a long-term Forward Plan to set out its strategic direction for up to ten years ahead, and to fulfil requirements for Accreditation and funding applications to the Heritage Lottery Fund. It envisages two main stages, Stage I (the Heritage Quest Centre project) which will pave the way for Stage II (development of the Museum building and Castle site). Maximisation of income generation, in support of the Museum Service's aims, is an integral part of this and features mainly in Stage II.

## Recommendations

Members are asked at this stage to note the draft Forward Plan and invited to comment on its development and the proposals for employing a business consultant to assess specific areas identified for financial feasibility and income generation. Subject to appropriate financial advice being obtained, it is proposed to present the completed Forward Plan for approval early in 2006.

## Background Papers

Discussion documents for Saffron Walden Museum Society Executive Committee and Museum staff, available from the Curator.

## Impact

Communication/Consultation	Saffron Walden Museum Society, as owners of the Museum building and collections, are key partners. Other significant consultees include: local community, Service users, and for Stage II English Heritage and schools
Community Safety	Improve safe use of Castle grounds
Equalities	Improving access for all to reserve collections, and to rural communities via outreach programme
Finance	Capital to be raised as described in the report; subject to fund-raising from various sources

Human Rights	No implications identified
Legal implications	No implications identified
Ward-specific impacts	All
Workforce/Workplace	Heritage Quest Centre and Saffron Walden Museum

## Situation

1. The draft Forward Plan sets out the Museum Service's purpose, key aims and an analysis of the Service's situation and development, including a section on investment and income generation.
2. It is proposed to seek advice from a financial and business consultant on the feasibility and options for the following:
  - (i) The potential for developing a new Museum shop in a future extension, including staffing and administrative support required for options identified
  - (ii) Potential afforded by the collections of reproductions for sale and licensing of reproductions, and initial investment required in commissioning reproductions
  - (iii) The feasibility of developing an on-site refreshment area for visitors
  - (iv) The hire of premises (both the Museum and the Castle ruins) for other uses
3. In addition, the Museum Society proposes to commission an architect's feasibility study to establish the size and nature of a future extension to the Museum building, and an approximate estimate of cost. This information is essential for the development of Stage II plans.

## Risk Analysis

Risk	Likelihood	Impact	Mitigating actions
Failure to produce Forward Plan by spring 2006, would jeopardise gaining of Accredited status	Low	High	Development of Forward Plan autumn/winter 2005 in advance of deadline

Forward Plan will not be implemented, e.g. through lack of resources	Medium	High	Collaboration of Council and Museum Society, seeking wider support and funding, and advice on realistic costs and income generation potential
Stagnation and decline of Service, and lack of capacity to obtain 'best value' from collections, if issues in Forward Plan are not addressed	High	High	Seek involvement and support of all stakeholders, build new audiences and support in community through Stage 1 (Heritage Quest Centre project)
Additional workload on staff may become excessive, with consequences for Service users of other aspects of service are neglected	High	High	Careful phasing of Stages I and II; additional support e.g. with extra administrative work generated where necessary. Fund-raising support already in place for Stage I (HQ Centre). Expectations on Service's ability to respond to other new initiatives must be realistic.

## **SAFFRON WALDEN MUSEUM / UTTLESFORD MUSEUM SERVICE**

### **DRAFT FORWARD PLAN 2005**

Date: October 2005  
Due for review: October 2006 and annually thereafter

#### **1. Introduction**

The Forward Plan for Saffron Walden Museum / Uttlesford Museum Service is a rolling plan intended to cover approximately the next 10 years in outline, and to be reviewed and adjusted annually so that the Service's strategic direction is kept focused and in step with circumstances which will inevitably change. From the Forward Plan, an annual Service Plan for the incoming financial year will be developed according to Council requirements, which will treat objectives, actions and financial planning in greater detail for the year immediately ahead.

The Statement of Purpose and Key Aims in this Forward Plan are the springboard for the Museum Service's other policy documents and strategies, as required by Accreditation, funding bodies or good professional and managerial practice. Detail of other important aspects of the Museum Service's will therefore be found in

- Acquisition & Disposal Policy (to come)
- Collections Management Policy (to come)
- Education Policy (October 2005)
- Access Policy (to come)
- Marketing Strategy (September 2005)

The Museum Service supports the following Corporate Plan Themes of Uttlesford District Council:

- Protecting and Enhancing the character of the district
- Promoting Tourism, Culture and Leisure Opportunities
- Improving Access to Value-for-Money Services
- Supporting Lifelong Learning and Opportunities for Young People

#### **2. Statement of Purpose**

Our aim as Uttlesford Museum Service is to give people

- a sense of place in the present
- and inspiration for the future
  
- through our wide-ranging collections and the histories they represent
- and by sustaining a proactive, high-quality service

### 3. Key Aims

To realise our purpose, we aim to

1. Maximise and preserve the depth, quality and relevance of collections, information and the stories they tell to reflect the human history, culture and natural environment of Uttlesford and the wider world
2. Welcome all users by providing physical and intellectual access to collections and services to meet different needs
3. Create opportunities for formal and informal learning and enjoyment, by building on our strengths as an educational resource
4. Contribute to the protection and appreciation of the local environment and the special historical and natural heritage of the Uttlesford landscape
5. Promote Uttlesford's heritage to a wider audience
6. Celebrate and advance our role as an historic but forward-looking, high-achieving museum service, in accordance with national standards
7. To support the development of the Service, seek appropriate opportunities to generate income in keeping with the Accreditation scheme for museums, the Museums Association's *Code of Ethics* and the aims and target audiences of the Museum Service
8. Cater for a variety of users, but in particular target
  - Family learners – adults with children (a 'family-friendly' museum)
  - Young adults – 16 to 29 age range
  - Rural Communities in Uttlesford - especially new communities
  - Special Interest Groups – relevant to collections
  - Tourists and Visitors – especially within 1 hour's drive of Saffron Walden

### 4 Background

The Museum Service comprises

- Collection of over 170,000 items, some of regional and international significance
- 1835 purpose-built grade II listed Museum building
- Schoolroom / Laboratory / Store annex, in grade II listed ex-school building
- Off-site store, inadequate and due for replacement by Heritage Quest Centre
- Staff of 6.8 FTEs plus team of 30+ volunteers for reception duties; occasional work experience and other volunteers to help on specific projects

There have been two significant external studies of the Museum Service in the last ten years. In 1995 a feasibility study of the Museum Service was undertaken by Val Bott. Most of the recommendations of that report are still current and some are incorporated into this Forward Plan, revised where appropriate. An Audience Development report by ABL in 2005, funded by the

Heritage Lottery Fund in anticipation of the Heritage Quest Centre project, made a detailed analysis of actual and potential audiences for the Service. Other in-house surveys, less formal evaluations and a non-visitor report (England Marketing, 2002) have also contributed.

A SWOT analysis for the Museum Service is published in ABL's Audience Development report (2005) and repeated in the Museum Service's Marketing Strategy (2005). For the purpose of this Forward Plan, the most relevant points are:

### **Strengths**

- History – rare early 19<sup>th</sup> century museum, Castle ruins on green site
- Collections: variety, something for everyone, mix of global and local
- Well-respected education service
- Good community links and volunteers
- Loyalty of core visitors
- Support of Museum Society and District Council
- Enhances town's / district's tourism and cultural potential

### **Weaknesses**

- Poor, cramped storage
- Shortage of room to grow and deliver services
- Lack of modern visitor facilities (shop, café)
- No dedicated outreach staff and small marketing budget
- Staff stretched: multiple roles, not enough curatorial posts to cover all collections
- Poor ITC provision and use

### **Opportunities**

- Collections – including new excavation archives from Stansted Airport and other developments, and need to record other changes in local history and environment
- Use ICT to develop access and learning
- Education partnerships
- Increased community and youth involvement
- Events, talks, courses programmes
- Growing public interest in local history
- Partnerships with regional museums (*Renaissance in the Regions*), archives, libraries
- Tourism promotion
- Use of Museum Society's charitable status to generate support and donations

### **Threats**

- Budgetary and staff restraints – standing still or capacity declining
- Risk of damage to collections resulting from poor storage
- Lack of capacity to seize opportunities

- Increasing competition from local attractions and other leisure pursuits

## **5. Analysis**

### **5.1 A Collections-based Service**

A Museum Service is defined by its collections, and from these flow all its services, cultural and community benefits, activities, marketing and opportunities to generate income in support of its aims. The primacy of collections and the need to provide for their long-term use, in an efficient and effective way, is therefore the starting point for the Forward Plan. Existing collections, especially those housed in sub-standard accommodation at Newport, need re-housing and a significant input of staff time to rationalise, assess and catalogue them digitally, so that new services and audiences, and hence new community benefits and income where appropriate, can be generated. The continuing relevance and development of the Service also depends on its ability to renew and enhance collections, recent archaeological excavations and contemporary collecting (recent history of local communities) being especially in need of attention. The Heritage Quest Centre project, providing a new collections resource to replace the off-site store at Newport, has been designed to meet these needs and develop new audiences across the district.

### **5.2 A Quality Visitor Experience**

Visitor facilities in the 1835 Museum building are out-dated and need improving, and it is also desirable that facilities for schools should be kept separate to some extent, as school parties can overwhelm some areas (reception, WCs, sales desk, ground floor gallery) and impinge on other visitors. Facilities for schools and a host of other learning activities and functions need improvement. The Museum has also introduced corporate and private hire in recent years, but its kitchenette is old and inadequate to support this, or any form of refreshment outlet, which some visitors have requested. There is always scope for extending displays and showing more of the Museum's extensive collections, and providing a new and larger gallery for special exhibitions, which could be closed off during 'exhibition change' weeks. Restrictions on space and staffing limit the potential of the Sales Desk; a larger, more modern Shop could enhance the educational role of the Service with a wider range of collections-related souvenirs and local publications, and introduce more reproductions featuring the collections (subject to funding), but may require a review of staffing arrangements for reception and sales.

Meanwhile many of the permanent galleries are becoming due for renewal, primarily the Ceramics Gallery (last redisplayed in the 1970s). Accommodation for staff and researchers is poor, cramped and like on-site storage, is tucked into odd corners round the building. Efficient working suffers from the lack of properly planned office and workspace accommodation behind-the-scenes. On-site storage for collections is

cramped and there is no proper provision for storage of equipment, display and packing materials. Some are stored in awkward spaces (e.g. over Great Hall ceiling) where Health & Safety become issues, and access can be difficult. The electrical wiring, lighting and plumbing of the Museum have been complicated over the years by piecemeal additions and if the Museum building is extended, the opportunity should be taken to overhaul these in their entirety to ensure a properly-functioning building with maximum energy efficiency, which in turn should minimise running costs.

The Schoolroom / Laboratory / Store annex cannot be extended and its position isolated from the main Museum, and off the driveway, coupled with restricted WC facilities, make it unsuitable for general public use. If a new Learning & Activities room can be accommodated in a new Museum extension, the existing Schoolroom could be adapted to house the Costume collection, allowing proper hanging space and much improved access to this important collection, which (following 2005-06 *Living Costume* project in Essex) should be generating more requests for access. This and the removal of some other collections to the Heritage Quest Centre would de-congest storage areas in the Museum and allow for a re-assessment of the use of space, plus other temporary changes necessitated by building work at the Museum.

#### **Priorities for extending the Museum are:**

- New Reception Area and Larger Shop; entrance/reception area for schools may need addressing separately, with space for coats and lunch boxes
- Seating Area, with drinks machine and water cooler for visitors; the options and viability of a café-type facility need further investigation
- New and more WCs, to accommodate schools as well as visitors and staff
- Multi-purpose Learning and Activities Room for schools, activities, lectures, or for hire-out to other organisations and private individuals; with storage for Handling Collections, equipment (flipchart, projectors etc)
- New Kitchenette, adjacent to above (for functions) but accessible to staff as well
- Improvements to accommodation for Staff and Researchers, including better, centralised facility for reference books and documentation, larger work area for preparation of exhibitions, meetings etc. Separate office areas needed for administration / management functions and collections work (the two are unsatisfactorily combined at present in one cramped Workroom).
- New Special Exhibitions Gallery, with storage off for display cases, plinths and new Workshop attached (replacing old Workshop which would need to be demolished)



### **5.3 Historic Site**

The Museum needs to be considered in the context of its historic site, incorporating the remains of Saffron Walden Castle and its walled grounds, a scheduled ancient monument. Although the Museum Service does not have responsibility for management of the Castle and grounds (these lying with other departments of the Council), the public do not make this distinction and it is essential to include the Castle and grounds in the scheme, which will need to be developed in co-operation with English Heritage for the statutory consents. Development of the Museum building and any other work disturbing the ground will require some archaeological work, if permitted, which will have to be included in development costs, but could become a positive if temporary 'heritage event' in its own right. It should be noted that the Castle is on the list of Scheduled Monuments at Risk and its condition is a cause of concern to local residents and visitors, who make their views known to Museum staff. There is also a feeling that the town should take more pride in its Castle remains and that it is an underused resource and heritage feature.

#### **Priorities for Grounds are:**

- Area outside new entrance / Learning & Activities Room so that functions can 'spill out' onto paving or grass in fine weather
- Improve Pedestrian access and Car Parking, while preserving overall landscape
- Remove old Workshop, subject to accommodation being replicated in new extension
- Improve maintenance, access and interpretation of Castle, emphasising its importance in the origins and layout of the medieval town, also explore ways of using it as a community facility e.g. simple outdoor arena inside keep for small-scale performances, licensing for summer weddings and functions.
- Improve grounds as family and visitor picnic area and amenity
- Improve access to Church Street / Common and articulation of whole site with Common

### **5.4 Investment and Income Generation**

The Museum Service's current position can be summed up as 'low investment – low return'. For instance, the small sales desk is staffed by a rota of volunteers, mostly retired, and a paid assistant on Saturdays. Historically, only three hours per week of the Visitor Services Officer's time is supposed to be allocated to management of the shop; in practice it is more time-consuming. There is little space for storing stock, which is aimed mainly at school parties, who account for most spending.

An extension of the Museum would offer new income-generating opportunities. Staffing needs and revenue budgets would need to be

reviewed in tandem with development of the Museum site. Specialist guidance will be sought on options, which could include:

#### Shop options

- Small, volunteer-run with slightly extended range of lines – but essentially ‘low cost – low return’ as before
- Some paid staffing, more extensive retail outlet with credit card payment
- Shop run in tandem with TIC (much shared stock) – similar to above
- Explore possibility of existing retailer running shop on shared profits basis (local retailer, local museum consortium, larger museum from Cambridge?)

#### Refreshment options

- Self-service drinks and seating area (as at Colchester Castle)
- Kitchenette for teas at events and weekends (volunteer-run)
- Franchise out as commercial concern, but doubtful if footfall in Saffron Walden is sufficient to make this viable?

Offering refreshments to visitors is primarily an extension of visitor services and a factor, which may encourage (repeat) visits, and therefore more admissions and shop spending, rather than a significant income-generator in its own right.

Income generation falls into three categories:

#### **Fund-raising**

- Essentially the responsibility of the Museum Society, in liaison with Museum staff, fund-raising can be for capital or collections-related projects
- Scope for long-term building of Society’s funds through charitable giving and bequests, to enhance its support for the Museum in the long-term
- Sponsorship may occasionally be obtained for specific events or exhibitions but is unreliable as a source of income, and does not repay the outlay in staff time unless substantial sums are involved. In a predominantly rural area, there are relatively few large businesses and a lack of sponsorship culture among smaller ones. The growth of businesses around Stansted Airport may offer a little more scope, but not a regular source of income. The public main-road site for the Heritage Quest Centre offers the possibility of good advertising frontage for sponsors for outreach activities and events.
- Donations Box – augmented with a ‘sound effect’ in August 2005, which appears to be increasing donations (however not a major source of income: around £680 per year, 2003/04 and 2004/05)

#### **Trading** *(review of fees and charges anticipated 2005-06 and regularly thereafter)*

- Payments, fees for goods and services where charging is appropriate
- Charges for educational services – schools, talks by staff

- Reproduction charges for images, filming etc, potential growth area though unpredictable because largely re-active to requests, e.g. £200 from BBC Wales 2005 for use of image of 'gladiator' relief in television programme
- Sales of souvenirs and publications. Scope for more souvenirs and publications specifically relating to collections, but lack staff time to develop and write
- Hire fees for use of Museum – a new area with potential for further development, subject to extension of Museum building and Casual/Security staffing

**Admissions** (*review anticipated 2005-06 and regularly thereafter*)

- Entrance charges and Season Tickets

## 6. Objectives and Spending Plan

In summary, a two-stage development for the Museum Service is proposed. The first stage (Heritage Quest Centre project) will address the fundamental problems of inadequate premises for collections and their usability, and provide the building resources for an outreach programme to build new audiences. Critically, it will free up some congested areas of the Museum and so enable the second stage (improvement of the Museum buildings and Castle site) to take place.

### Stage I

Heritage Quest Centre will

- Provide improved care and access for archaeology, natural sciences and some social history, meeting Accreditation standards
- Allow collecting to continue where necessary to reflect development of district and communities and make better use of collections
- Increase *Users* - get out to new audiences especially young people, families and rural communities, and build support base for Service
- Free the Museum Service and site sufficiently to enable improvements and an extension to the Museum building to take place, by providing alternative accommodation for collections and some aspects of the Service during Stage II building alterations
- By overhauling collections and related information, and improving collections' accessibility, enable development of more collections-based activities and new displays in an improved (Stage II) Museum building, which in turn will help to generate income (admissions, fees, retail of souvenirs and publications etc)

### Funding

Funding will rely on a successful application to the Heritage Lottery Fund for at least £500,000 and raising a similar amount of matching funding from other sources, plus a capital contribution of at least 5% (estimated at least £65,000)

from the Council. The Museum Society's charitable status is being used where appropriate to attract donations and grants.

Ongoing revenue costs of the Heritage Quest Centre will be largely offset by the savings made on relinquishing the old off-site store at Newport. There will be other considerable long-term savings and benefits, not quantifiable financially, in improvements to collections care and services.

## **Stage II**

Museum Site Development needs to

- Increase *Visitors* and improve quality of visitor facilities and experience
- Maximise income generation opportunities of Museum and site
- Improve use and interpretation of Castle and grounds
- Resolve cramped accommodation for researchers, staff and collections remaining on-site

## Funding

Saffron Walden Museum Society will be responsible for raising capital for the development. It is anticipated that a significant part of this would be provided from existing assets, principally the Curator's House which if sold could raise a significant sum (between £300,000 and £400,000?) to re-invest in the Museum building. English Heritage may be able to grant-aid conservation of the Castle ruins. Any remaining capital required would need to be raised from foundations and grant-giving organisations (but not the Heritage Lottery Fund).

Ongoing revenue costs of an extended building and services provided should be expected to increase accordingly but it is planned to offset these by energy efficiency savings (following complete overhaul of the Museum) and additional income generated.

Objectives with outline of dates and costings (where known) for both phases are tabled on the below. Objectives are numbered for convenience, but this does not necessarily imply a chronological sequence: some may run concurrently or overlap.

**Stage I 2005 -**

No.	Date	Objective	Meeting Key Aims	Cultural benefits	Expenditure £ estimate	Income £ estimate
1	05/06	<b>Prepare for Accreditation and Funding Bids</b> Develop / revise Forward Plan and other key policy documents with Council and Museum Society, especially for HLF application for Heritage Quest centre project	6	Sound professional basis for planning and operation of service		
2	05/06	<b>Marketing Strategy</b> Improve marketing	5, 7	Greater awareness of what Museum offers	Extra £6,000 for 05/06 only	
3	05/06	<b>Essex MDF project Living Costume (Renaissance)</b>	1, 3, 5, 8	Improved knowledge and use of costume collections, touring display and workshops, greater public awareness		
4	06/08	<b>Hub project using Egyptology collections (Renaissance)</b>	1, 2, 3	Wider audience through project with Fitzwilliam, new ways of using Egyptology collections with specific groups		
5	06/07	<b>Ceramics Gallery?</b> Subject to staff availability and funding (HQ Centre priority)	1, 2, 3, 8	More up-to-date display of greater interest to more visitors while retaining specialist audience, greater educational use for gallery	£100,000 approx (would require separate fund-raising)	
6	06/07 (07/08)	<b>Heritage Quest Centre Year 1</b> Plan, build, sort and digitally catalogue off-site collections. Plan and begin to develop outreach programme. Organise move from Newport store.	1, 6	Rationalise existing collections, identify alternative uses (e.g. schools packs) where appropriate, lay foundations for improved services	(HLF-funded project)	
7	07/08 (08/09)	<b>Heritage Quest Centre Year 2</b> Set up and open new HQ Centre, launch with events and activities on- and off-site. Develop digital catalogue for on-line searching and other e-services.	2, 3, 4, 5, 6, 8	New opportunities for target audiences to engage with heritage and culture	(HLF-funded project)	Look for grants and sponsors to enhance outreach
8	08/09 (09/10)	<b>Heritage Quest Centre year 3</b> Outreach programme around Uttlesford in full flow. Market on-line services, develop learning materials.	2, 3, 4, 5, 6, 8	As above plus extension of remote users on-line	(HLF-funded project)	As above

**Stage II 200? -**

No.	Date	Objective	Meeting Key Aims	Cultural benefits	Expenditure £ estimate	Income £ Estimate
9		<b>Plan for Museum extension and work on Castle</b> Negotiate for consent from English Heritage Appoint architect and produce plans and costs Museum Society to assess assets (Curator's house, other funds) and plan fund-raising required	2, 4, 5, 6	Raise awareness of town's origins and medieval heritage	Building costs to be assessed (consultant)	
10		<b>Prepare for Building Work</b> Communication to user and public Remove collections affected by works to HQ Centre Relocate some activities to HQ Centre as necessary	2, 6			
11		<b>Realise potential of Castle ruins</b> Clean, conserve, improve access and interpretation Open up for new uses (outdoor performances, weddings?)	4, 5, 7	Heritage tourism Key feature for understanding medieval town, local pride Educational asset	EH grant	Venue fees
12		<b>Re-open extended Museum</b> Basic visitor facilities and main displays functioning Essential offices and workspaces re-organised	1, 2, 5, 6, 7, 8	High quality of visitor experience will attract more visits	Increased Cleaning needs, energy	Savings from greater energy efficiency
13		<b>New Educational and activity programme</b> New Learning & Activities Room will fulfil multiple functions, including use for evening and weekend events and hire	2, 3	Enhanced facilities for and range of educational work	Security Staff to invigilate hiring	Hiring out (private, business and for meetings)
14		<b>Set up new Museum Shop and Refreshment point</b> Hiring of premises and licensing of reproductions	2, 7	Extend learning and ways of making visit enjoyable & memorable	To be assessed (consultant) Reproductions (Museum Soc)	To be assessed (consultant)
15		<b>New Special Exhibitions programme</b>	1, 2, 3, 8	Greater range of displays, fuels activities programme	Variable (in-house or hire)	May attract some sponsorship towards costs
16		<b>Address ongoing redisplay of permanent galleries</b> Ethnography, Archaeology.... Making better use of collections which have been enhanced by sorting, better accommodation and resulting research opportunities, and new additions in some areas to maintain relevance	1, 2, 3, 4, 5, 8	Up-to-date, latest research, refresh tired galleries, more interactive exhibits for families	Project budget and fund-raising for each new gallery	(Will encourage more visits)