



ST BARBE
MUSEUM+ART GALLERY

St Barbe
Museum + Art Gallery
2019/2020 Annual Plan

Introduction

This is our Annual Plan which identifies our key objectives and how we intend to achieve them. We will use this plan to inspire our team and prioritise our work over the coming year. This is a working document and will be regularly reviewed during the year.

Vision: To become the most respected small Museum and Art Gallery in the UK

Mission: We will achieve our vision by:

- 1 Constantly challenging ourselves to improve the range of cultural experiences for our audiences through the way in which we:
 - Collect and interpret the cultural heritage of the New Forest Coast
 - Deliver world class exhibitions
 - Produce innovative cultural programmes
 - Organise diverse outreach opportunities

With the aim of diversifying our audience to ensure that we reach out to our whole community of varied background, age and abilities.

- 2 Attracting a larger, varied and loyal group of donors and revenue-generating visitors to provide a financially resilient base for our continuously expanding activities.
- 3 Making St Barbe a great place to work for staff, volunteers and trustees.

Core Values

The integrity of our charity and of everyone who works here is hugely important to us if we are to fulfil our mission and realistically aspire to our vision. We will be:

- **Creative** – in everything we do and in the way we collaborate with others
- **Demanding** – of ourselves and of our working practices
- **Fair** – in our approach to audiences, supporters, colleagues and the wider community

Situation Analysis

- Tastes are changing and the young are questioning what seemed appropriate in the past. Leisure time is expanding, but there is increasing choice and competition for the leisure pound. Small museums and art galleries will have to raise their game if they are to survive in a competitive market.
- Our collection policy is dated and needs to be more proactive to include contemporary collecting, rigorous disposal management, a constantly developing relationship with local business and clever messaging to our local community, indicating where the gaps in our collection are. We need to ensure that we adhere to Accreditation and Collections Trust SPECTRUM Standards.
- The permanent Museum display has been expertly produced. However there have been some comments from visitors over the past year suggesting that the pre-HLF displays were more evocative and more engaging for children. We do not currently have a facility to properly record these comments. The Museum gallery does need to have a regular update to ensure that it continues to be relevant and interesting to the local community and encourages repeat visits.
- Our exhibition strategy, whilst producing excellent exhibitions, is currently limited in scope and therefore limits our opportunities for audience development. The Museum needs to provide greater variety in content and duration. Selected exhibitions must be newsworthy at a national and international level. Where appropriate we should work in tandem with other organisations to provide an excellent offer to our visitors.
- Opportunities for hosting exhibitions are lost due to a lack of long-term planning and logistics. Our in-house planning strategies also need to make better use of opportunities that come with partnerships and funding possibilities.
- The Museum building has been refurbished to an excellent standard. Premises must be maintained to a first-class standard. Plant must be improved to meet requirements. Storage must be improved in quantity and quality.
- Interactive technology is transforming museums and exhibition experience. St Barbe must work hard to invest our money wisely and ensure technology is used appropriately to develop the visitor experience.
- St Barbe must be an exemplar for corporate citizenship, including energy efficiency, waste disposal and other appropriate initiatives.

- St Barbe must be in the forefront of the provision of access and outreach in the New Forest. We must partner with local access organisations and rural communities to develop advice panels, projects and resources. We must to work to develop business, educational and research partnerships throughout the county.
- Young people in the local community have had many services and facilities cut; consequently, there are issues with anti-social behaviour locally. We need to ensure that we are providing an essential community resource that will act as a focus for young people. We should develop a youth panel to provide youth led projects and programming, information and advice to help us shape the future of the Museum and ensure its relevance to future generations. We must be good community supporters and citizens, becoming an essential part of the local community.
- The café and shop are already providing an excellent service to the community which helps with our own fundraising. They must continue to develop their stock and services to ensure that we are a regular destination for relaxing and retail therapy.
- The Visitor Information Point is no longer supported by the local authority. However, there is a demand for us to continue to provide the best information services for visitors and tourists to the New Forest.

Objectives and plans to achieve them

	Subject	Timing	Finance
1	Enrich and expand the range and quality of our Museum		
1.1	Develop a collection policy for the next 10 years to include proactive collecting from businesses and local authority sources including collecting historical and contemporary items	Q2	£200
1.2	Develop ideas and opportunities to expand the estate to accommodate growth of the collections	Q4	£1K
1.3	Make the collections catalogue available on-line	Q2	Funded
1.4	Add value to the permanent displays by creating sensory and children's trails	Q4	£1K
1.5	Work with the learning and engagement team, youth panel and other advisory groups to develop new interactive equipment to increase visitor engagement	Q4	£500
1.6	Update the 'permanent' displays by: <ul style="list-style-type: none"> - Rotating the objects in cases, so more of our objects can be seen by our visitors - Adding content to the digital access point - Adding elements of interactivity 	Q1-4	£1K
1.7	Improve the way we work with collections volunteers by creating work packages for those who come in on both a weekly and ad hoc basis	Q1	
2	Develop an appealing and diverse programme of exhibitions		
2.1	Ensure exhibitions fully engage with our target audiences and look for touring exhibition opportunities	Q1	
2.2	Expand the subject areas for exhibitions and develop an annual rhythm for exhibitions including child-focused exhibitions in the summer holidays and in-house curated exhibitions using local artists and our own collections during the winter months	Annual	
2.3	Build partnerships with national and international museums, curators and collections to deliver unique and inspiring exhibition projects	Q2	
2.4	Involve young people and other community groups in the selection and development of exhibitions, events and activities	Q2	£500

3	Expand and diversify the cultural experiences of our audiences by improving our outreach and the services we provide		
3.1	Develop advisory groups to ensure that the Museum is broadening and diversifying and prioritising audience development targets: <ul style="list-style-type: none"> - Youth panel - Access panel - Dementia partnerships - Autism partnerships 	Q3	£1.5K
3.2	Maintain safeguarding procedures for children and vulnerable adults	Q1	£200
3.3	Develop programming to encourage new audiences and repeat visits	Q1	
3.4	Develop outreach programming to raise awareness of the Museums' services and facilities	Q3	£1K
3.5	Work with local businesses to develop training, work placement and apprenticeship opportunities	Q3	£500
3.6	Translate footfall to the café and shop into paying visits by upgrading the signage and positive messaging	Q2	AIM Grant
3.7	Ensure that all formal and informal learning programmes expand and enhance our visitors' cultural experience	Q2	£5K
3.8	Improve our audience research and evaluation processes to better understand the needs of our visitors and Friends	Q2	AIM Grant
3.9	Evaluate the provision for visitor research in the King room to ensure we are providing the appropriate services	Q2	AIM Grant
3.10	Ensure the shop and the café thoroughly complement the Museums' aims and objectives	Annual	
3.11	Ensure the Visitor Information Point optimises the use of the available space in the shop area	Annual	
4	Boost our marketing to increase and diversify our audience		
4.1	Research and enhance all signage, internal and external. Review messaging in print i.e. posters, leaflets, digital and virtual	Q1	AIM Grant
4.2	Review distribution and publicly displayed locations of all print marketing i.e. posters and banners	Q2	AIM Grant
4.3	Ensure St Barbe is promoted widely by free editorial and budgeted advertising in appropriate, targeted publications	Q2	£1K
4.4	Ensure website is effective and accessible on mobile devices to improve the user experience. Generate online traffic directly to our site through linking with social media platforms and through using Search Engine Optimisation (SEO). Develop website content – e.g. digitised collection, exhibitions and local history information	Q3-4	£5K

4.5	Further develop our social media platforms: Facebook, Twitter, Instagram, Trip Advisor and YouTube. Collect and use social media data analytics to understand and target different audiences.	Q3-4	£500
4.6	Develop an overall awareness of both prominent local events e.g. Lymington Seafood Festival and National themed campaigns e.g. Heritage Open Days, and decide which St Barbe should be associated with for marketing purposes	Annual	£-
4.7	Produce and maintain a detailed and regularly updated plan of yearly marketing activity	Annual	
5	Attract a larger, more varied and loyal group of donors through a comprehensive fundraising strategy		
5.1	Generate income through a portfolio of funding streams including: <ul style="list-style-type: none"> a) Public Bodies – (HCC, NFDC, L&PTC, New Forest National Park Authority, AIM, ACE, HLF) Build long term relationships with these bodies and ensure all important dates for funding applications are noted and adhered to. b) Trusts and Foundations – have a thorough knowledge of all relevant grants that can be applied for and timescales/deadlines. c) Businesses – Build relationships to encourage take up of our Business Partnership and Sponsorship opportunities d) Major Donors – cultivate relationships and promote suitable projects for funding e) Patrons - recruit further patrons and actively steward f) Friends (Silver and Gold) – Further encourage uptake of Friends membership, have Direct Debit facility and new prices in place g) Legacies – Produce appropriate literature and distribute with stakeholders and businesses i.e. solicitors, funeral directors h) Endowment – Tie with legacy giving. Any legacies to be put into Endowment fund. Launching Autumn/Winter 2019 i) INSPIRE fund (Regular giving) – Develop campaign for regular giving to ‘Inspire’ people to give regularly to support the various community projects we aim to deliver. Launching on 14-15 September 2019 to tie in with National Heritage Open Days 	Annual	Income target schedule exists
5.2	Maximise revenue grants list. Provide evidence and information including available council grants, dates for grant applications etc.	Q1	
5.3	Ensure that all fundraising activity includes full cost recovery and as far as possible maximises the receipt of unrestricted funds to contribute to core running costs	Annual	
5.4	Record and update all funding contacts, communications and income raised on ‘Subscriber’ database	Q1	£600
5.5	Produce and maintain a detailed and regularly updated plan for yearly fundraising activity	Q4	

6	Make St Barbe a great place to work		
6.1	Provide a supportive and creative environment for staff and explore regular training opportunities	Annual	£3K
6.2	Improve HR policies, practices and procedures to enhance recruitment and retention	Q2	
6.3	Promote, enhance and celebrate opportunities for our volunteers in Collections, Marketing and Learning	Q1	£500
6.4	Recruit new Trustees, when appropriate, to build on existing skills and commitment	Q2	
6.5	Improve training opportunities for volunteers and Trustees	Annual	£1K
6.6	Build relationships with local colleges and universities to develop programmes and volunteer opportunities for younger people	Q2	
6.7	Be open and transparent in all our communications	Always	
6.8	Ensure an atmosphere of curiosity, ambition, innovation and fun in the whole team	Annual	
7	Improve our property, plant and equipment		
7.1	Explore opportunities to expand our premises in the neighbourhood of St Barbe. Develop a strategy for use of increased space, including financial viability	Q1	£2K
7.2	In the short term improve our storage by cleaning the existing store, removing all uncatalogued items, rationalising the collection and re-packing and labelling the boxes. By the end of the year have a strategy to increase the available storage space by 20%	Q3	£2K
7.3	Improve Environmental and Security Controls. Investigate the costs to improve the environmental conditions of the Museum and store to ensure that St Barbe can continue to borrow major works from National and International collections	Q2	£3K (Tate grant)
7.4	Protect the Museum with additional shutters to enable loans in the Museum galleries	Q4	£5K Capital
7.5	Develop a new stock of showcases to enable changes of display in the Museum galleries and to allow us to borrow material from other collections, thereby helping to contextualise existing permanent displays	Q4	£70K Capital
8	Improve financial performance and operational efficiency		
8.1	Monitor and review fundraising activity	Annual	
8.2	Manage operational costs by analysis and continuous monitoring against budget	Annual	
8.3	Reduce bookkeeping costs by more efficient FOH operations	Q1	
8.4	Improve profitability of Shop by continuous review of monthly turnover and stocks with Retail Consultant	Annual	
8.5	Review Café licence alongside operator's financial viability	Q1	
8.6	Maximise revenue from venue hire through website and social media advertising	Annual	
8.7	Reduce utility costs by consultation with energy advisor	Q1	
8.8	Produce timely Gift Aid Claims	Annual	

Financials

The Annual Budget for 2019/20 shows operational income and costs for the year and a percentage variance from the forecast for 2018/19. Comparisons with the actual performance for 2017/18 are not 'like for like' as the Museum only reopened partway through the year. By far the biggest unknown is how sure we can be that the overall fundraising target of £149,000 is achievable. This represents a 43% increase over last year. We believe that the aggregate of all sources is realistic but that the constituent parts may vary from the Plan.

In 2017/18 and 2018/19 we are progressively moving from the closure during the refurbishment, to full operational status, which results in an increase in staffing levels from our pre-operational period. However, in 2019/20 we are still only budgeting for one full time member of staff and 8 part time staff, equivalent to 4.5 full time members of staff in total. We are heavily reliant on the continuing support of our volunteers to provide front of house services which enable us to open to the public 7 days per week. We are extremely grateful for this support, as without it, our costs would increase substantially.

Explanatory notes are annotated and scheduled on the following page

Financial Opportunities and Risks complete the financial package.

St Barbe Museum and Art Gallery - Annual Budget for Year to 31st March 2020

	Actual 2017/18	F/cast 12 months for 2018/19	<i>Budget 2019/20</i>	% Variance over F/cast 2019/20	Notes
<i>INCOME</i>					
General Admissions	28,047	27,299	<i>30,000</i>	9.9%	
Friends' and Patrons' Memberships	18,055	19,184	<i>27,500</i>	43.3%	
Art Commissions	74,130	11,052	<i>4,000</i>	-63.8%	1
Cafe & Shop (net income)	17,797	7,480	<i>19,400</i>	159.4%	2
Friends' Activities	6,229	500	<i>6,000</i>	1100.0%	3
Sponsorship/ Business Partners	6,250	6,108	<i>17,500</i>	186.5%	
HLF Funding		81,513	<i>106,916</i>	31.2%	
ACE Grants	33,232	46,020	<i>50,000</i>	8.6%	
Public sector Grants	30,450	15,000	<i>3,000</i>	-80.0%	4
Trusts & Foundations		16,125	<i>20,000</i>	24.0%	
Donations	17,175	18,715	<i>31,500</i>	68.3%	
Other Income (Inc. Gift Aid and Venue hire)	6,102	10,575	<i>13,000</i>	22.9%	
TOTAL INCOME	237,467	259,571	<i>308,816</i>	19.0%	
EXPENDITURE					
Salaries and Consultancy	68,126	135,392	<i>171,795</i>	26.9%	5
Marketing	18,972	4,800	<i>10,000</i>	108.3%	
Training		125	<i>3,000</i>	2300.0%	
Recruitment		3,057	<i>500</i>	-83.6%	
Fundraising Costs	18,534	1,405	<i>1,000</i>	-28.8%	6
Advertising and Publicity	14,881	8,051	<i>10,000</i>	24.2%	
Engagement (Inc. advertising)		3,107	<i>3,000</i>	-3.4%	
Exhibition Costs	57,350	38,692	<i>30,000</i>	-22.5%	7
Premises	21,333	22,035	<i>30,000</i>	36.1%	
Governance & Operational Costs	22,701	32,092	<i>40,000</i>	24.6%	8
Other	2,633	3,667	<i>4,000</i>	9.1%	
TOTAL EXPENDITURE	224,530	252,423	<i>303,295</i>	20.2%	
SURPLUS/DEFICIT	12,937	7,148	<i>20,521</i>	187.1%	

Notes to Accompany Annual Budget

- 1 2017/18 amount (£74,130) includes sales from inaugural 'Dashwood' exhibition on re-opening. Reduced target reflects fewer 'selling' exhibitions
- 2 Shop income in 2018/19 is diminished by the costs incurred in employing the services of a Retail Consultant. This committed investment in both stock and expertise is producing continuous growth in turnover in 2019
- 3 Friends Activities in 2017/18 included the bi-annual 'Open Gardens' event to be repeated in 2019/20
- 4 Public Sector Grants from Hampshire County Council have diminished over recent years and amount to zero in the annual budget. The nominal amount shown in 2019/20 represents targeted local grants
- 5 Salaries and consultancy include Marketing and Fundraising salaries and Exhibition Consultancy. 2017/18 figures are significantly lower than forecast and budget as a full staff complement was not in place and figures do not therefore represent a full year's cost. There is no planned increase in staff in 2019/20 and figures reflect the full year of staff recruited in 2017/18
- 6 Fundraising Costs in 2017/18 represent professional agency fees incurred during the HLF capital project
- 7 Exhibition Costs in 2017/18 reflect inaugural 'Dashwood' of sale and are reduced in the 2019/20 budget reflecting the number of planned exhibitions
- 8 Governance & Operational Costs are high in the 2018/19 forecast due to an increased bookkeeping requirement to support front of house duties

Financial Opportunities and Risks

Opportunities

- To exceed budgeted admissions by increasing footfall into Museum and galleries
- To exceed targeted fundraising of £149,000 in aggregate. However, this may be achieved from differing constituent elements
- Premises costs present an opportunity to manage more efficiently through the services of an energy consultant

Risks

- Failure to achieve necessary fundraising target as it represents a substantial increase over 2017/18 and forecast 2018/19
- Planned exhibitions do not generate the necessary local/national interest resulting in reduced admissions income
- Volunteer involvement falls short of all Front of House plans necessitating higher staffing costs

Key Performance Indicators (KPIs)

	Subject	Q1	Q1	Q2	Q2	Q3	Q3	Q4	Q4
1	Key Performance indicators	Target	Actual	Target	Actual	Target	Actual	Target	Actual
1.1	Paid Admissions to the Museum and Art Gallery								
1.2	Footfall								
1.3	Number of exhibitions								
1.4	School groups attending and using our services								
1.5	Outreach activity off site sessions								
1.6	Number of Friends								
1.7	Engagement activities on site								
1.8	Social media activity – digital statistics								
1.9	Press coverage – number of mentions in the press - editorial								
1.10	Income generation and fundraising								
1.11	Evaluation and feedback from visitors								
1.12	Shop figures - Turnover								
1.13	Shop figures – spend per visitor								
1.14	Volunteer numbers								