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## NFNPA RAPC 255/15

### NEW FOREST NATIONAL PARK AUTHORITY

### RESOURCES, AUDIT AND PERFORMANCE COMMITTEE MEETING – 9 MARCH 2015

#### NEW FOREST CENTRE AGREEMENT

Report by: Nigel Matthews, Head of Recreation Management and Learning

#### 1. Summary

- 1.1 This report seeks Members' support for a newly updated Agreement between the Ninth Centenary Trust and the National Park Authority for the running of the New Forest Centre. The proposed five-year Agreement is based on the current three-year Agreement which itself was based on one that was first signed in July 2007.
- 1.2 The Authority currently contributes £40,000/year to the Trust and the new Agreement proposes that this continues for the next five years. The benefits to the Authority are outlined, as are the mechanisms through which officers and Members currently receive information about the Centre and its performance and through which we can influence and be engaged in future developments.

#### 2. Recommendation

It is recommended that the Committee:

- 1) **consider the proposed five year agreement between the Ninth Centenary Trust and the National Park Authority, and**
- 2) **if thought appropriate, recommend to the Authority that it enters into the proposed agreement and continues to allocate £40,000 per year to the Ninth Centenary Trust for the duration (April 2015 – March 2020).**

#### Resources

£200,000 over five years, plus staff time

## **Papers**

NFNPA RAPC 255/15

NFNPA RAPC 255/15 - Annex 1 Agreement between the New Forest National Park Authority and the Ninth Centenary Trust

NFNPA RAPC Annex 2 Draft New Forest Centre Development Plan

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## **Equality and Diversity Implications**

There are no equality or diversity implications arising directly from this report. The New Forest Centre has an Audience Development Plan and an Access Plan which together address potential equality issues.

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## **NEW FOREST NATIONAL PARK AUTHORITY RESOURCES, AUDIT AND PERFORMANCE COMMITTEE MEETING – 9 MARCH 2015**

### **NEW FOREST CENTRE AGREEMENT**

Report by: Nigel Matthews, Head of Recreation Management and Learning

#### **1 Background to the Agreement and the Association**

- 1.1 The primary objective of the National Park Authority's association with the Ninth Centenary Trust is described in Section 2.1 of the proposed Agreement (**Annex 1**): *'to develop and operate the New Forest Centre as an essential component of the New Forest visitor's experience providing a sustainable, informative and enjoyable opportunity for all users, to increase their understanding and enjoyment of the New Forest focusing on its natural beauty, wildlife and cultural heritage with fully integrated local and visitor information services'*.
- 1.2 The NPA has signed two previous agreements, starting on 1 July 2007 (ca. five year duration) and 1 April 2012 (three year duration).
- 1.3 The Agreement is one of the NPA's most significant partnerships, with a current programme fund commitment of £40,000 each year. This contribution represents about a tenth of the Ninth Centenary Trust's overall funding. Other regular grant funding comes from New Forest District Council (about £13,000, in addition to the rent it pays for the space occupied by their Visitor Information Centre).
- 1.4 The content of the proposed new Agreement is fundamentally unchanged from the last one. Various sections have been updated to reflect current terminology and others have been simplified to aid clarity. The section about the content of the Development Plan (7.2) is more detailed, highlighting the importance of this document to all partners involved in the Centre.

#### **2 Progress in delivering for the National Park**

- 2.1 Over the years, very considerable progress has been made in delivering the two purposes of the National Park through the Centre. The branding of the Centre and its publicity reflects that of the National Park and as a result it is often viewed as the National Park Visitor Centre. Joint working and funding bids have resulted in many of the displays being updated, training for front of house staff, many National Park themed events and exhibitions, project launches and excellent liaison with regard to formal education work. There is a real sense that the Centre is a gateway to the present-day National Park as well as an excellent window on the New Forest's past.

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- 2.2 The NPA's annual operational plan always includes a range of actions which benefit from joint working with the Centre so that we can reach as wide an audience as possible.
- 2.3 In addition to the indicators of success within the Agreement (see 4.1 below), the NPA has had the following 'measure of success' within its current (2011-15) Business Plan:
- Increase the number of visits made to the New Forest Centre's museum by 50% (30,000 people each year)

In 2011 it was hoped that this step change in museum entrants could be achieved by removing the need for a museum entrance fee (currently set at Standard Ticket £4.00, Concessions Ticket £3.00, Accompanied under 16s and Members free). Entrance to the temporary exhibitions in the Gallery is free and some 45,000 people are recorded as entering this area. A major rearrangement of the layout and visitor flow around the Centre might also have achieved the same result. Either way many more people would have learned more about the New Forest through spending time in this part of the Centre.

- 2.4 However, financial constraints have meant that neither of these options has been possible and the current average number of museum entrants has averaged just over 17,000. Trustees, Centre staff and NPA officers would still like to increase museum entrance figures and will continue to explore ways to achieve this.

### **3 Current developments**

- 3.1 We have been working with the New Forest Centre and NFDC for the past year on a project called 'Integrated Visitor Services'. The intention is to better integrate the front of house services at the Centre, encompassing the welcome, visitor information, museum entry sales and shop in order to both improve the visitor experience and the financial sustainability of the Centre.
- 3.2 The NPA allocated a one-off contribution of £35,000 from underspend in 2013-14 to facilitate this. So far £20,000 has been used on:
- concept design consultancy for a new layout for the front of house area
  - retail consultancy, which has already resulted in significant improvements in shop performance.
- 3.3 Options considered for integrating the front of house included shared staffing arrangements (between the Trust and NFDC), a central shared sales and information desk and an extensive list of other improvements. However, the total cost of implementation (over £200,000) was far greater than could be found from partner organisations and fundraising.

- 3.4 A more pragmatic and affordable option is now being implemented, involving smaller changes to the layout – including moving the sales desk closer to the museum entrance to enable Centre staff to more easily promote this to visitors. The NPA's remaining £15,000 is available for this work.
- 3.4 We are developing a new, interactive 'plan your car-free day' touch-table for the visitor information part of the Centre, funded by the Local Sustainable Transport Fund. This will include Wi-Fi for use by visitors to the Centre.
- 3.5 The New Forest Centre is currently a key partner in the HLF Landscape Partnership Scheme bid, both to host events and exhibitions and in delivering the 'E-cademy' project which, if the bid is successful, will result in the digitisation of the contents of the Centre's Library – and making this available through a web-based portal.

#### **4 Value for money**

- 4.1 The proposed new Agreement includes the following indicators of success (Section 1.7):
- *Continued development of museum content that reflects National Park purposes;*
  - *An events and exhibitions programme that features National Park themes including joint events, a special event for National Parks' Week and a number of Authority curated exhibitions;*
  - *An education programme that includes joint education sessions with visible National Park themes;*
  - *Agreement to co-operate in developing and running mutually beneficial income generation schemes such as retail of small range of National Park branded items and assisting in the trial of new initiatives.*
- 4.2 The NPA's investment ensures a visible National Park presence at the most prominent existing visitor centre in the New Forest, supports an existing provider and reduces the risk of wasteful duplication.
- 4.3 Some 230,000 people enter the Centre each year, including both visitors and local residents – a very significant audience for National Park messages, at a cost of only 17p/contact. There is always room for improvement and the NPA will always want to convey some of its messages directly, but these figures do indicate at a basic level that the New Forest Centre can offer high volume for the investment.
- 4.4 The NPA could try to develop its own visitor centre but thus far it has chosen to work through partner organisations, and given the NPA's current financial constraints it is unlikely that this strategy will change soon. For the same reasons, our Local Information Points are also run through local businesses.

#### **5 Funding options and length of Agreement**

- 5.1 There is a range of options for the level of funding provided by the NPA: it could discontinue funding, provide a smaller annual grant, continue with the current contribution or give more.
- 5.2 To varying degrees, reduced funding would go against the good will and joint work which have been generated since 2007, and there would be reduced expectation of joint working. Increased funding could be justified on the grounds of becoming a larger 'shareholder' at the Centre with greater expectation of tangible benefits to the National Park but would be dependent on the NPA finding and justifying additional resources at a time when these are shrinking.
- 5.3 The proposed new Agreement assumes that NPA funding for the Centre will remain at £40,000 a year (with no allowance for inflation). The grant was reduced to this amount (from £50,000) in April 2013 as part of a wider programme of budget cuts prompted by reduced core funding from Defra.
- 5.4 The proposed Agreement is for five years whereas the NPA's next Business Plan will be for only three years. Break clauses could be inserted, though the Agreement already includes in section 8.2 the following: *"The Authority reserves the right to alter or amend the agreed funding schedule at any time, at his absolute discretion. However such discretion shall only be exercised in exceptional circumstances unforeseen or not in existence at the date of this Agreement."*

## **6 Involvement and monitoring**

- 6.1 NPA officers and Members currently have representation through the Centre's Executive Management Group (EMG). One Member is also a trustee of the Ninth Centenary Trust.
- 6.2 The EMG approves an annual Development Plan (draft attached as **Annex 2**) for the Centre which defines clear targets of performance and standards of service to be provided by the Centre.
- 6.3 As well as attending the EMG, officers regularly work with Centre staff and with District Council officers on a range of projects. This ensures joined up working across a wide range of new and ongoing work programmes. As need or opportunity arises various other NPA staff have regular contact with staff at the Centre, e.g. to liaise over education work, events, exhibitions and the library collections.

## **7 Recommendations**

**It is recommended that the Committee:**

- 1) consider the proposed five year agreement between the Ninth Centenary Trust and the National Park Authority, and**
- 2) if thought appropriate, recommend to the Authority that it enters into the proposed agreement and continues to allocate £40,000 per year to the Ninth Centenary Trust for the duration (April 2015 – March 2020).**

# New Forest Ninth Centenary Trust and New Forest National Park Authority

Agreement setting out the basis of the Association between  
New Forest Ninth Centenary Trust and New Forest National Park Authority  
2015-2020

THIS AGREEMENT is dated the 2015 and sets out the terms on which the New Forest Ninth Centenary Trust (“the Trust”) of the New Forest Centre Lyndhurst Hampshire will provide visitor services in association with the New Forest National Park Authority (“the Authority”) of Lymington Town Hall. Together the Trust and the Authority will be referred to as “the Parties”.

## **1. Statement of Intent**

- 1.1 The Parties to this Agreement have worked and intend to continue to work in association (“the Association”) to provide for the effective operation of the Centre and efficient delivery of services to best meet the needs of all visitors.
- 1.2 The provision of the New Forest Centre, and this Agreement, help the Authority meet the objectives of its business plan in providing a resource to increase the understanding and enjoyment of the New Forest for visitors and local communities.
- 1.3 The Trust is the freehold owner and occupier of the New Forest Centre (“the Centre”) from which it provides museum, library, education and gift shop services (“Trust Services”).
- 1.4 The Authority and Trust intend to work together to fulfil the New Forest National Park’s purposes by the provision of exhibitions, displays, literature, talks, child and adult education, and other services at the Centre.
- 1.5 The Authority has provided and intends to provide funding contributions to support the long-term financial sustainability of the Centre. The Trust for its part intends to use all efforts to make its operations financially self-sustaining.
- 1.6 The following indicators of success do not represent obligations in respect of this Agreement, rather they are indicative of the intent of the Parties:
  - a. Continued development of museum content that reflects National Park purposes;
  - b. An events and exhibitions programme that features National Park themes including joint events, a special event for National Parks’ Week and a number of Authority curated exhibitions;
  - c. An education programme that includes joint education sessions with visible National Park themes;
  - d. Agreement to co-operate in developing and running mutually beneficial income generation schemes such as retail of small range of National Park branded items and assisting in the trial of new initiatives.

## **2. Primary Objective of the Association**

- 2.1 The primary objective of the Association is to develop and operate the New Forest Centre as an essential component of the New Forest visitor's experience providing a sustainable, informative and enjoyable opportunity for all users, to increase their understanding and enjoyment of the New Forest focusing on its natural beauty, wildlife and cultural heritage with fully integrated local and visitor information services.
- 2.2 The Association covers all services provided or hosted by the Trust including the New Forest Museum, New Forest Gallery, Reference Library, education services, gift shop, events and visitor information services but focuses mainly on interpretation and information, governance and management.

## **3. Duration**

- 3.1 An Agreement has been in place since 1 July 2007. This updated version is to run from 1 April 2015 to 31 March 2020.
- 3.2 The Parties expect to renew this Agreement for a further period commencing on 1 April 2020 on such terms as they may then agree and on the absolute discretion of the Parties.

## **4. Review and Amendments**

- 4.1 The Parties will have a working relationship that allows regular liaison and discussion about the way in which the Agreement is developing and working. Development of the relationship will be managed through regular meetings and two-way relationships between the officers and staff of the Parties' organisations. This Agreement and the manner in which the Parties are fulfilling their obligations may be more formally reviewed at the discretion of either or both Parties.
- 4.2 To be effective any amendments or alterations to this Agreement will be recorded in writing and signed by the Parties.

## **5. Governance of the Agreement**

- 5.1 A joint group entitled the Executive Management Group ("the Group"), which pre-exists this Agreement, will continue in its role to steer and oversee the provision of services and other matters governed by the provisions of this Agreement.
- 5.2 Membership of the Group will comprise three nominees appointed by the Trust (one of whom will be the Chairman of the Trust); one nominee appointed by New Forest District Council ("the Council"); two nominees appointed by the Authority and one co-opted independent member to be agreed by the Parties.

- 5.3 The Chairman of the Trust will be appointed chairman of the Group. The Chairman, the Council nominee and the co-opted independent member will not have the right to vote. For clarity the members of the Group who will have the right to vote on any decision are the two Trust nominees (other than the Chairman), and the two Authority nominees.
- 5.4 As far as possible any decision of the Group should be reached by consensus. Normally, it is expected that a vote will not be necessary, but if consensus cannot be reached a vote will be taken and recommendations made to the Parties, if agreed by the majority of members of the Group. The Parties will accept any recommendations so made except where to do so would give rise to a fundamental conflict with their other interests or responsibilities. Where this is the case, the matter shall be remitted to the Group for further consideration.
- 5.5 The Parties accept that, subject to the provisions expressed in this Agreement, the Trust has ultimate authority and responsibility for the management of the Centre and the performance of the operations undertaken within it.
- 5.6 The frequency of meetings will be decided by the members of the Group but in any event, the Group will meet no less frequently than once each quarter.
- 5.7 The Trust administrator will act as Secretary to the Group. The Centre Manager will attend the meetings of the Group.
- 5.8 The Group will, by decisions taken as defined here before, delegate its responsibilities to members of staff of the Partners' organisations for execution on a day-by-day basis.

## **6. Governance of the Trust**

- 6.1 The Trust has invited and shall continue to invite a member of the Authority, as nominated by the Authority, to sit as Trustee of the Trust and attend all Trust meetings. In respect of matters relating to this Agreement, such Trustee shall declare an interest.
- 6.2 All liabilities arising as a result of the employment by the Trust of the Centre Manager or any other staff, whether due to the application of employment protection legislation or under common law, shall be borne solely by the Trust.

## **7. Development Plan**

- 7.1 The Trust shall ensure that the Centre Manager produces a financial and business plan ("the Development Plan") defining clear targets of performance and standards of service to be provided by the Centre in relation to Trust Services and Integrated Visitor Services. The Development Plan will be approved by the Group and endorsed by the Trust and the Authority's Resources, Audit and Performance Committee.
- 7.2 The Development Plan will:

- a. Meet the demands of Museum Accreditation, linking to the five main goals of Arts Council England,
- b. Link to the key aims and objectives of the New Forest National Park Authority,
- c. Be reviewed annually, and contain the aims and objectives of the Trust and the means by which they are to be carried out. It will also contain a programme of activities for the delivery of all services, which is regularly reported upon to all Parties and more broadly expressed through an annual Operational Plan,
- d. Identify a broad range of users and link to an Audience Development Plan that identifies target audiences and describes marketing activity,
- e. Describe the work of the education service that meets the needs of school children, family and lifelong learners and that links to and contributes to a network of education and interpretation organisations delivering education within and about the Forest,
- f. Identify the role of the Trust's Museum and Reference Library as a central repository for museum and library collections that relate to the Trust's Collections Development Policy,
- g. Ensure that collections security is met through the implementation of a Security Plan and the provision of an Emergency Plan,
- h. Ensure that access to the Collections and Trust Services is met through the implementation of an Access Plan,
- i. Ensure the implementation of a Collections Management Framework that includes Collections Development, Collections Documentation, Collections Access and Collections Care and Conservation policies, plans and procedures and which links to the Collections Management Framework of the Lymington Museum Trust,
- j. Provide a forecast three year Management Forecast Budget that identifies any forecast deficit,
- k. Ensure the implementation of a Fundraising Plan in response to any forecast deficit or proposed development.

## **8. Funding by the Authority**

- 8.1 To support the provision of the Centre, the Authority agrees to provide funding to the Trust by way of revenue contribution for the operation of the Centre and delivery of Trust services in accordance with the agreed Development Plan. In light of the Authority's own funding position following recent Government spending reviews, the amount of funding will need to be continually reviewed.

However for the period of this Agreement the funding contribution, paid quarterly in advance, is deemed as follows:

Financial Year	Amount
2015/16	£40,000
2016/17	£40,000
2017/18	£40,000
2018/19	£40,000
2019/20	£40,000

- 8.2 The Authority reserves the right to alter or amend the agreed funding schedule at any time, at his absolute discretion. However such discretion shall only be exercised in exceptional circumstances unforeseen or not in existence at the date of this Agreement.

## **9. Default and Termination of the Agreement**

- 9.1 If either Party considers the other Party to be in default of their obligations under this Agreement they may notify the other Party in writing of the reasons it considers the other Party to be in default, and if appropriate matters should be considered by the Parties at the meeting of the Group. The Parties shall make all reasonable efforts to agree a joint plan of action to remedy the situation.
- 9.2 Where despite any action taken in accordance with the previous sub-clause a Party still considers the other Party to be in default, they may give that Party notice specifying the default of the action to be taken to rectify it (“a Default Notice”). The Default Notice shall state a period of time being a reasonable period of time in which the required action is to be taken and will accord with the requirements of the terms of this Agreement as to reasonableness.
- 9.3 If either Party is in default of their obligations under this Agreement and fails to comply with a Default Notice the basis of the default will be referred by the Group back to the parent bodies – the Trust and the Authority – and either Party may give notice in writing terminating this Agreement (“a Termination Notice”). A Termination Notice shall take effect no earlier than twelve months from the date that the Default Notice is served.
- 9.4 If termination occurs the Parties undertake to remove all references to the other relating to this Agreement from their respective products signage and publicity. Notwithstanding this, the Trust may continue to use the name “New Forest Centre”.

- 9.5 If the situation arises where either Party considers in its absolute discretion that no purpose would be served in serving a Default Notice, they may serve a Termination Notice. Any Termination Notice will take effect no earlier than twelve months from the date of the Termination Notice. Such discretion is only expected to be exercised in exceptional circumstances, such as incidences of fraud, corruption or dishonesty.
- 9.6 Termination of this Agreement shall have no effect on the liability of either Party to the payment of any sums arising under it, or any rights or remedies of either Party already accrued, prior to the date upon which termination takes effect.

## **10. Data Protection Act 1998**

- 10.1 The Parties shall at all times comply with the Data Protection Act 1998 including, where appropriate, maintaining a valid and up to date registration or notification under the Act.
- 10.2 The Parties shall not disclose personal data to any third Parties other than:
- a. to employees and sub-contractors to whom such disclosure is reasonably necessary in order to carry out the service; or
  - b. to the extent required by law.

## **11. Freedom of Information Act 2000**

- 11.1 The Parties recognise that the Authority is subject to legal duties which may require the release of information under the Freedom of Information Act 2000 ("the 2000 Act") or any other applicable legislation governing access to information, and that they may be under obligation to provide information to third Parties on request. Such information may include matters relating to, or arising out of, this Agreement.
- 11.2 The Trust will assist the Authority to enable it to comply with its obligations. In the event that the Authority receives a request for information under the 2000 Act or any other applicable legislation governing access to information, and requests the Trust's assistance in obtaining the information that is the subject of such request or otherwise, the Trust will respond to any such request for assistance at its own cost and promptly, and in any event within seven days.

## **12. Health and Safety**

- 12.1 The Trust shall at all times take all such precautions as are necessary to protect the health and safety of all persons employed or contracted by them in connection with, and members of the public who are visitors to the New Forest Centre, and shall comply with the requirements of the Health and Safety at Work Act 1974 and of any other Acts, Regulations or Orders pertaining to health and safety at work.

12.2 Whilst on the Trust's premises the Authority's staff shall comply with the Trust's general statement of safety policy and with any reasonable requirements of the Trust for maintenance of health and safety.

### **13. Legal Requirements**

13.1 Each Party shall at all times conduct its affairs in a reputable manner, and observe all legal requirements.

### **14. Assignment**

14.1 Neither Party shall assign or sub-contract any of their responsibilities under this Agreement without the prior consent in writing of the other Party, such consent not to be unreasonably withheld.

### **15. Reasonableness**

15.1 Any steps of any kind to be taken by either Party in accordance with the terms of this Agreement shall be taken reasonably, in good faith and without unreasonable delay.

### **16. Indemnity Clauses**

16.1 Each Party shall be liable for the consequences of any breach of its obligations under this Agreement, including any injury to, or death of, any person, or loss of, or damage to, any property, except and to the extent that such consequences are a direct result of the act, omission, default or negligence of the other Party, or except and to the extent that such breach is a direct result of circumstances beyond the Party's control which could not reasonably have been avoided by that Party. Each Party shall indemnify the other against any expense, liability, loss, claim or proceeding in respect of any such injury, death loss or damage and shall maintain such insurances as are necessary to cover this liability.

Signed on behalf of the

**NEW FOREST NINTH CENTENARY TRUST**

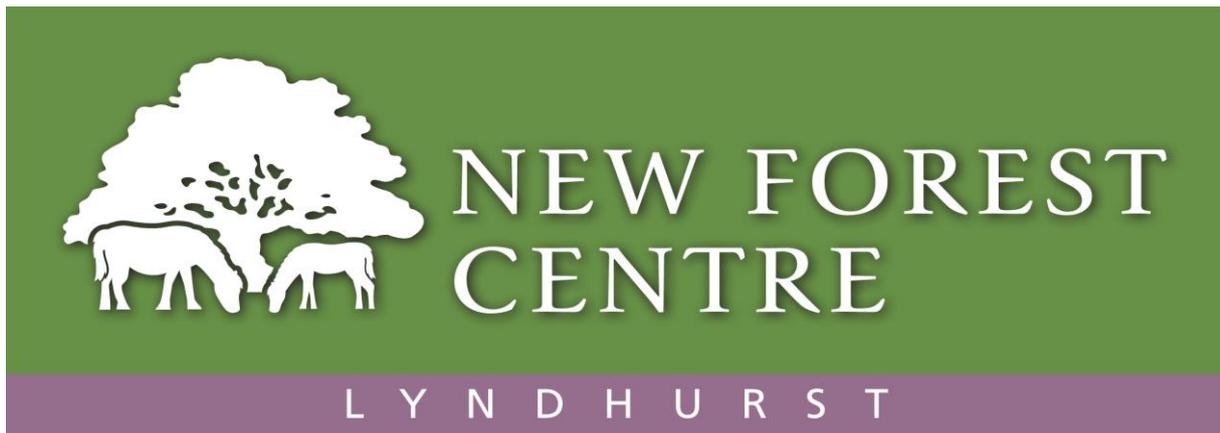
Authorised Signatory

Signed on behalf of the

**NEW FOREST NATIONAL PARK AUTHORITY**

Authorised Signatory

DRAFT



# **DEVELOPMENT PLAN 2015-2020**

# **DRAFT**

(2<sup>nd</sup> draft 26 Feb. 2015)

**Governing body: New Forest Ninth Centenary Trust**

This plan replaces the Development Plan of 2011-15, approved 04.10.12 and reviewed and approved 13.03.14. It has been prepared as a five year plan and reviews the earlier plan of 2011-15.

**Date on which this Plan was approved: 24 March 2015**

**Date at which this Plan is due for review: March 2020**

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# 1. Statement of purpose

The New Forest Ninth Centenary Trust (the Trust) has summarised its purpose and direction of travel in a mission statement that replaces our previous mission, vision and value statements.

*The New Forest Centre aims to inspire its visitors to celebrate and conserve the New Forest. It does this by collecting, conserving and interpreting its collections and by providing educational activities and information to a broad range of audiences. In doing so, it acts in ways that are ethical, ecologically sensitive, accessible and affordable.*

**(revised November 2013)**

The Trust achieves its purposes through the delivery of services primarily at the New Forest Centre, a purpose built museum, reference library, education facilities, temporary exhibition gallery and visitor centre.

## 2. Introduction

### A brief history

The New Forest Ninth Centenary Trust was founded in 1979 for the purpose of commemorating the nine hundredth anniversary of the New Forest. As a result of extensive fundraising, the New Forest Museum and Visitor Centre was built and opened to the public in 1988. In 2007, the Trust entered into an agreement with the newly created New Forest National Park Authority (NPA) and re-branded the building as the New Forest Centre.

Building on the status of Full Registration, the Museum was awarded Full Accreditation by the Museums Libraries and Archives Council (MLA) in 2009, demonstrating the Trust's commitment to maintaining a high standard of service and efficient museum and collections care. In 2014, the Trust retained its accredited status.

Since its establishment as a registered charity, the Trust has relied heavily on funding from both private and public sources of income. In addition to annual grant funding from the NPA and New Forest District Council (NFDC), Hampshire County Council, the Christopher Tower Foundation, the Barker-Mill Foundation and the Heritage Lottery Fund have been generous patrons.

In addition to a board of trustees, the Trust operation employs the equivalent of 4.5 full time member of staff and the Trading operation employs the equivalent of 3.2 full time members of staff. In addition, we have a growing number of skilled volunteers.

As a charity, we comply with the demands of the Charities Commission and as an accredited museum we seek to maintain those standards as administrated by Arts Council England (ACE).

## **3. Review of 2011-15 Development plan**

The 2011-15 Plan took the three main headings used in the accreditation return to organise the Trust's activities. This devise allowed for consistent reporting and assisted the 2014 return process. The three year timeframe linked to the Association Agreement with the NPA written prior to the changes made by ACE to the Forward planning accreditation demands in October 2011. The decision was taken to update the current plan to not only fulfil the new criteria, but to consult with staff and other stakeholders during the course of the Plan. A brainstorming day was organised and facilitated by our Museum Development Officer and staff, volunteers and colleagues from the NPA were asked to think creatively about the future of the charity. A SWOT analysis was created and the Plan was revised accordingly to reflect the findings and to meet the new accreditation demands.

*For SWOT analysis see Appendix 1*

### **3.1 Users and their experiences**

The focus of the 2011-15 Plan was on fulfilling the actions defined in the ADP and the Data Collection Plan. Running alongside, was the proposal to create a volunteer Gallery Steward Team to help facilitate visits to the Museum. Much of what was detailed in the ADP in term of a stronger marketing identity, the development of social media and the re-launching the Friends Membership Scheme have been achieved, whereas plans for a touring exhibition service and developing 'behind the scene' tours were not developed due to a lack of resources. The Gallery Steward Scheme on the other hand has been a resounding success. It was recognised however that our marketing ambitions far outstripped our ability to achieve them and the need for a designated member of staff to undertake the principle marketing activities was recognised. Equally, the success of the Gallery Stewards scheme put pressure on the Education Team in charge, but as a result of staff turnover the Trust was able to offer an extra day to the Education Development Officer to officially manage the volunteer team.

Our core schools activity has been consolidated and continues to grow. Changes to the curriculum which were not anticipated in the 2011-15 Plan resulted inevitably in a major restructuring of our led sessions. This has taken up a considerable amount

of staff time but we have now finalised the transition, staff and freelancers have been re-trained and contacts with schools have been renewed. At the same time, our family and adult provision has been extended. Discovery Days are now themed and run largely by volunteers and a number of lifelong learning initiatives have been piloted. Some, such as the led walks during the summer months did not prove successful whilst other initiatives remain to be developed. The overall conclusion reached was that whilst it was relatively simple to stage an event, we struggled to back it up with sufficient marketing to ensure an audience. Regular annual events that relied largely on the NPA communication channels, local knowledge and word of mouth, such as the Discovery Days and National Parks Day continued to grow and be successful.

### **3.2 Collections**

The Plan put collections at the heart of the Centre's operation, ensuring that all Trust activity sprung from their development and care. It was recognised quite early on that the Trust did not have the resources needed to adequately care for their collections and advice from our Museum Mentor and Museums Development Officer, funding was successfully sought to undertake a situations review and subsequently to appoint a part-time collections technician. The two day a week post ensured that the actions detailed in the Plan were completed and this work continues today.

As the Plan was created prior to the new accreditation demands of October 2011, a number of new policies were drawn up that were not detailed in the original Plan, namely - Care and Conservation, Documentation, Access and Environmental Sustainability. During the course of the Plan, and as a result of a Library Review conducted by the Trustees in 2012, the decision was made to bring the Library 'special collections' under the umbrella of the main accredited collections, a factor that is reflected in the Trust's revised Care and Conservation and Documentation Plans. The process of defining and assimilating the Library collections continues into the current Plan.

We succeeded in bringing WW2 objects, stored in the collections out on to public view, notably a Lumberjill uniform, donated to the Centre and small objects relating to the Forest during the wartime period. This was achieved as a result of grant funding secured through the NPA led, HLF funded WW2 project. The E-cademy project however did not come to fruition during the course of the Plan, despite efforts to secure funding from both the Local Sustainability Fund and HLF. The decision was taken on the advice of the NPA's fundraising officer to develop the project as part of a proposed Landscape Partnership Scheme (LPS) 'Our Past, our Future', a process that is still underway and subject of this Plan.

### 3.3 Organisational health

New trustees appointed during the course of the 2011-14 Plan, have brought a range of new skills and knowledge to the Trust. More latterly we have had success in recruiting specialist advisors to help with specific projects. There remain gaps in our skills provision, but we hope to continue the process. Our general volunteer base has continued to grow and volunteers now significantly outnumber paid staff.

The Trust has enjoyed some considerable success in fundraising through grant application and private donors, however this is set against a backdrop of diminished funding from our principle funder, static income streams and rising costs. It became apparent that the measures proposed in the Plan would not meet our financial deficit and a Review of Service was undertaken following a meeting with our accountants. Staff consultation was undertaken in Spring 2014 and ideas gathered for both income generation and cost savings. A number of cost saving strategies had already been implemented, e.g. switching energy providers, installing LED lighting in the Trust areas and installing an energy efficient gas boiler as a result of a capital grant fund from NFDC. Gift aid on admission tickets proved to be another useful income stream and other sources of revenue were explored e.g. increased room hire and large scale events. It was recognised however, that if the Trust was to remain solvent, substantial savings would need to be made. The Review Team undertook a departmental analysis that took in to account user numbers and income generation capacity and concluded that the Library could continue to offer a high quality, affordable and accessible service on a volunteer facilitated basis. Redundancies followed that resulted in some local concern, but also in an influx of new volunteers.

The Integrated Visitor Services Scheme (IVS) arose after the implementation of the 2011-15 Plan and has continued to evolve and develop over the last two years. NFDC, the NPA and the Trust are committed to providing excellent customer care and to ensuring that the Trust becomes financially sustainable. The resulting plans are the subject of this current Plan.

*For a more detailed review of the period 2011-15, please refer to the Trustees Reports accompanying the annual accounts.*

## 4. Context

***‘Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society’***

**Museums Association’s 1998 definition of a museum**

## 4.1 The local environment

The New Forest Centre is situated in Lyndhurst, the 'capital' of the New Forest. Once a medieval hunting ground, the landscape is still home to the commoning community whose livestock roam free on the open forest. The New Forest became a National Park in 2005 and is internationally recognised as an area of outstanding natural beauty and cultural history.

The Centre is situated at the exit end of Lyndhurst's central car park with a coach park nearby. The car park exit leads to Lyndhurst High Street, a busy local high street full of independent shops. The village centre can become extremely congested during the summer months which can put local people off from coming into the village but during this time we benefit from an influx of visitors staying in the nearby campsites, B&Bs and hotels. We share our front-of-house space with the Visitor Information Centre run by NFDC and we open our doors every day of year apart from Christmas Day, Boxing Day and 1 February (stocktaking). We now have approximately 230,000 visitors through the door every year although this is a drop from over 250,000 only a few years ago. The digital age has impacted on visits to the VIC and the Centre relies heavily on the footfall generated by the VIC who come into our shop and gallery. Entrance to the Museum has not increased for several years and the Museum is now in need of re-display.

The Centre is often perceived as being government funded and whilst it is not important from a customer point of view to understand the Centre's governance, it can hinder the Trust's ability to fund raise and manage expectations. Generous funding from the NPA and NFDC coupled with significant grants from trusts and foundations that often underwrite salary costs, have afforded the charity the opportunity to develop its services although the heavy administrative load this creates has put a strain on such a small organisation. Local industry has on occasion provided project funding and ExxonMobil at the Fawley Refinery in particular has continued to support small scale community based projects. Despite continuous fundraising by the trustees, the charity lacks regular and routine fundraisers and struggles to recruit such people to its volunteer ranks.

The New Forest is seen as an affluent area with little social deprivation. There are pockets of rural poverty however, along with areas of deprivation in the urban hinterlands. The urban areas also contain a more diverse population. The Forest contains a high percentage of active retired people and this has helped provide the Centre with an enviable volunteer team. Our target audiences are broad, being made up of both local residents and holidaymakers and the recent publication of the Audience Development Plan, developed as part of the LPS, is a welcome document to help understand and determine target groups.

The New Forest Museum, is one of about 2,500 museums in the UK, over 1,800 of which have been accredited. Since 2011 ACE has held national responsibility for museums, taking over from the Museums, Libraries and Archives Council and as such, is responsible for administering the Accreditation Scheme that indicates that a

museum has achieved a nationally approved standard in management, collections care and delivery of information and visitor services.

As part of this wider community of museums and more specifically, independent and local museums, we engage in dialogue with national organisations such as the Association of Independent Museum (AIM) and the Museums Association (MA). We also rely heavily on organisations such as the Collections Trust for additional information, training and support.

Regionally and as a result of government funding administered by ACE and awarded to regions as a result of a bidding process, the South East area is lucky enough to benefit from a museums development programme. A Museum Development Officer and Cultural Partnership Officer provide continuous support, training and networking opportunities and as an accredited museum, we also benefit from the advice and support given by a museum mentor.

## **4.2 Arts Council England**

*“Museums will help us understand our past and imagine our future, and libraries will be places where the hunger for knowledge is fed”*

### **Alan Davey – Chief Executive ACE**

In October 2011, ACE took over responsibility for supporting and developing museums and with it, the implementation of the Museum Accreditation scheme. When they did so, they revisited their five goals to reflect their new area of responsibility and took the opportunity to streamline and simplify their goals and to provide a clearer account of how they intended to measure and progress towards each one.

In implementing our own goals, we not only comply with the demands of accreditation but we also reflect the values expressed in ACE’s five goals. These are:

- 1. Excellence is thriving and celebrated in the arts, museums and libraries**
- 2. Everyone has the opportunity to experience and to be inspired by the arts, museums and libraries**
- 3. The arts, museums and libraries are resilient and environmentally sustainable**
- 4. The leadership and workforce in the arts, museums and libraries are diverse and appropriately skilled**

**5. Every child and young person has the opportunity to experience the richness of the arts, museums and libraries**

Goals 1 and 2 represent ACE's core mission – excellent arts and culture thrives and as many people as possible engage with it. A big part of these goals is the importance of ensuring that children and young people are able to experience and participate and they are a prioritised strand (goal 5). These three goals are built on the foundation of goals 3 and 4. ACE looks for models of cultural provision that are financially and environmentally sustainable and for an appropriately-skilled workforce which is truly diverse and reflects contemporary England.

### **4.3 Partnership working**

#### **New Forest National Park Authority**

In developing our audiences and delivering our services, the New Forest Centre has worked successfully in partnership with the New Forest National Park Authority (NPA) for seven years and is set to renew its association for another five years, this Spring. The success of the partnership has been recognised across the National Park family and within the museum community and we continue to strive for excellence in our service delivery underpinned by new models of sustainable development.

*For a review of the Benefits and Indicators of Success NCT/NPA Association Agreement 2012-15 see Appendix 2*

#### **New Forest District Council**

New Forest District Council has a long association with the Trust dating back to the late 1980s. Annual community grants have continued to underpin the education work of the Centre and the Visitor Information Centre on the ground floor has provided a joined-up approach to visitor and community engagement over the years. It is the aspiration of all organisations to offer a one-stop experience to visitors to the Forest through refurbishment of the ground floor, new technologies and staff training and development.

#### **Other partnerships**

Partnership working, not only includes our principal funders, but also the wider museums and archives community e.g. Hampshire Records Office, our sister museums e.g. St Barbe, neighbouring universities, Forest organisations and other local organisations, e.g. local history societies and parish councils. Our activity plan for the next five years provides numerous examples of partnership working and joined up thinking that has become the hallmark of our service operation.

## 5. Consultation

The New Forest Centre consults on an ongoing basis both informally and more formally. The following methods are employed:

- Visitors are encouraged to feed back through our visitor comments books or on-line. By inviting comments to open ended questions, it is possible to determine public reaction to our services. In addition, all temporary exhibitions have visitor comments books and periodic exit surveys are completed during the winter and summer months.
- Websites such as Trip Advisor and The Best of the New Forest, give visitors the opportunity to feedback after a visit and notifications are sent to staff if comments have come in. Our facebook page and twitter feed also provide an on-line platform for comment.
- A weekly Staff Bulletin is sent out to all trustees, staff and volunteers who are encouraged to respond to the Centre Manager or to feed-back informally to their line manager or volunteer co-ordinator. Regular and periodic meetings are held with staff and volunteers.
- Proposals and recommendations are made at the Executive (Trust) and Directors (Trading) meetings and if required to Full Trust. Trustees and other members have the opportunity to discuss and approve as agreed. Through the Executive Management Group (EMG), representatives from the NPA and NFDC are consulted on the Development Plan within the context of the NPA/NCT association agreement and NFDC's community grant funding.
- The Collections Team consult with our Museum Mentor and Museum Development Officer on an ongoing basis. Through the SE Museums Development Programme, the Centre Manager has the opportunity to meet with members of the SE Museums Development Panel and other neighbouring and regional museums. The network also affords contact with the regional relationship manager for ACE and other linked bodies, e.g. HLF and the Collections Trust.
- The recent creation of an Audience Development Plan in connection with the Landscape Partnership Scheme (LPS) 'Our Past, our Future' has afforded the Centre along with other New Forest organisations a unique opportunity to gather data about our audiences. These findings largely replace the data collected in the 2005 survey commissioned by the NPA.

Overall, feedback continues to be extremely positive about the Museum and our events.

*"Probably the best museum, especially for children, in the world. We come here every time we come to the New Forest and the children never tire of it"*

**19 February 2015**

We are conscious however that some of our users complain about the child focus and their comments can be particularly damaging when logged on a public platform such as Tripadvisor. Our own observations and anecdotal evidence from our

front-of-house staff and volunteers, confirms that there is a need to update the Museum displays in ways which appeal to all our audiences. Other comments have indicated a demand for skills based workshops and we have accordingly developed a pilot programme of activities for 2015.

Further anecdotal evidence suggests a need for a more integrated approach to our customer service and the need to utilise communication devices other than information panels. The Integrated Visitor Services Scheme is, in part based on this information.

These observations are echoed in the ADP and Interpretation Framework developed for the LPS and will be explored in greater detail in our own ADP as will the particular feedback gathered in response to the E-cademy project.

## 6. Key aims 2015-20

A five year time span was agreed for this Plan as many of the Trust's forward plans stretch ahead to 2020. It builds on the good work undertaken over the previous three years and ties to the demands of the Association Agreement with the NPA and those of our other funders including NFDC. The key aims have been grouped under the three headings of Museum Accreditation but the overriding themes of the next five years are:

1. **Financial sustainability**
2. **Access to our collections**

<b>Users and their experiences</b>	<b>1</b>	We aim to engage our core audiences and to reach out to new ones. We will do so by providing high quality informal learning experiences that link to our collections.
<b>Users and their experiences</b>	<b>2</b>	We aim to engage with children and young people by linking to formal education and to their areas of interest.
<b>Users and their experiences</b>	<b>3</b>	We aim to communicate our activities and provide information about our collections to a broad range of people through a variety of channels.
<b>Collections</b>	<b>4</b>	We aim to develop, document and care for our collections in line with the standards laid down by museum accreditation, ensuring that they are kept in perpetuity for future generations
<b>Collections</b>	<b>5</b>	We aim to interpret our collections through our museum displays and provide opportunities for greater access, creative learning and inspiration
<b>Collections</b>	<b>6</b>	We aim to create increased access to our collections, through digitisation processes and the development on an on-line information portal.
<b>Organisational health</b>	<b>7</b>	We aim to create a financially resilient organisation that continues to fulfil its charitable purposes in creative and sustainable ways
<b>Organisational health</b>	<b>8</b>	We aim to ensure a safe and healthy environment for our staff, volunteers and visitors and to ensure the long term security of the collections
<b>Organisational health</b>	<b>9</b>	We aim to develop our personnel and to promote diversity and skills development among our trustees, advisors staff and volunteers

## 7. Specific objectives 2015-20

In 2014, the New Forest Centre achieved museum accredited status again and in doing so agreed to comply with the standards set by accreditation. In fulfilment of these standards, a range of policies, plans and procedures were drawn up and agreed by the Board of Trustees. It is the work of the charity over the next five years to act in fulfilment of the standards of accreditation and to grow our services in ways that adhere to the goals and values of Arts Council England. In looking ahead over the next five years, two main themes emerge. These are:

1. Financial sustainability through partnership working and the adoption of resilient business practices
2. Access to our collections through volunteer facilitated visits, digitised on-line resources and creative and inspiring displays

The annual Operational Plan details SMART actions associated with the nine main aims and provides an overview of the following more detailed plans for the period 2015-20. Other more detailed plans are likely to emerge as a result of the Landscape Scheme, the Integrated Visitor Services Scheme, Collections Development and other activities. Associated plans are listed under the three main headings below.

### 7.1 Users and their experiences

*'We are welcoming and accessible. We exhibit collections and have a planned approach to identifying and providing a good quality service for a broad range of users'*

Some of the key developments planned for the next few years include:

#### Quarterly exhibitions

The move to quarterly exhibitions has allowed the Centre to concentrate on higher quality and potentially sponsored exhibitions. Since the beginning of the previous development plan, ExxonMobil have supported what has now become an annual Open Art competition held in partnership with the NPA. If successful, the LPS will enable the Centre to enjoy four quarterly exhibitions curated by the NPA over the four period. Covering topics linked the bid, the exhibitions will help draw in new audiences.

#### Common Thread

Another LPB project, entitled Common Thread, focuses on the New Forest Embroidery owned by the New Forest Association and on loan to the Trust. This community arts project will aim to bring interested groups and individuals together in creative pursuit. Designed by Belinda Lady Montagu,

the embroidery is itself the result of a community project and the final exhibition will we hope, include a recreation of the artist’s studio. In addition we aim to work with the NPA in developing an annual arts festival that will help bring the arts to the fore in the Forest.

### **EDGE (Educate, Discover, Generate Enthusiasm)**

The Education Team has recently expanded due to a successful HLF funded scheme entitled EDGE Applied for and administered by the Hampshire Museums and Galleries Trust, the resultant post has enabled the Centre to not only play host to the scheme but to benefit directly from its activities. Aimed specifically at engaging 14 to 24 year olds, the project aims to engage young people in cultural activities of their choice. By employing a facilitator the project hopes to reach out to young people including NEETs and other disenfranchised groups and assist them in developing and running their own cultural events.

### **Marketing and Audience Development**

When it comes to developing our audiences, the Centre has enjoyed success in the fulfilment of its Audience Development Plan (ADP) 2011-14. A revised plan was delayed for a number of reasons, including the need to make use of the extensive audience development and interpretation work being done as part of the LPB. Final plans have now been drawn up as well as a stand-alone and detailed audience development plan for the E-cademy project. These plans and their findings will help inform the ADP for the Centre for 2015-20. Alongside, museum specific data collection initiatives are being trialled by organisations such as the AIM and ACE.

A PR consultant has been employed to develop a marketing strategy and we hope to employ a part-time marketing assistant. Digital and social media have become increasingly important over a very short period of time and we plan to develop a new website and well as marketing practices within a short timeframe.

### **VAQAS**

Annual VAQAS accreditation is a hallmark standard that goes towards our museum accreditation return. The standard looks at all aspects of visitor services and represents a seal of visitor approval and satisfaction.

<b>Aim 1</b>	<b>We aim to engage our core audiences and to reach out to new ones. We will do so by providing high quality informal learning experiences that link to our collections.</b>	
1.1	Revise Access Plan to ensure that as many people as possible have access to the Centre’s collections and services	2015
1.2	Develop family focused and life-long learning activities throughout the year through our Discovery Days, quarterly exhibitions, skills workshops, talks and lectures	Ongoing

	and annual events e.g. National Park Day	
1.3	Run a community arts project linked to the New Forest Embroidery (Common Thread) and funded by the LPB to reach new and isolated audiences	2016-17
<b>Aim 2</b>	<b>We aim to engage with children and young people by linking to formal education and to their areas of interest</b>	
2.1	Continue to develop and deliver Education Team led schools sessions linked to the National Curriculum and to expand our schools audience base	Ongoing
2.2	Continue to develop and deliver informal learning sessions for children and young people's groups e.g. brownies and guides	Ongoing
2.3	Through the EDGE project, work with young people including the isolated and hard-to-reach in helping them to curate cultural activities linked to the Museum and Gallery	2015-18
<b>Aim 3</b>	<b>We aim to communicate our activities and provide information about our collections to a broad range of people through a variety of channels</b>	
3.1	Continue to operate a marketing strategy that makes best use of financial resources available and maximises opportunities for editorial and effective communication through connection to New Forest Tourism and associated tourism organisations.	Ongoing
3.2	Develop an Audience Development Plan and makes reference to the work completed for the LPS and links directly to our LPB projects. In fulfilment of the ADP, achieve VAQAS accreditation.	2015-20
3.3	Develop the Centre's databases and digital media presence and create a new website that allows for digital engagement e.g. phone apps. Engage with data collection initiatives e.g. Visitor Verdict and Insight.	2016-20

**Associated plans:**

- Audience Development Plan – to be revised Sept 2015
- Access Plan – to be revised Oct 2015

## 7.2 Collections

*'We manage collections effectively and make them and the information they hold available to everyone'*

### Museum and Library collections

The Library Special Collections have been brought into the main Museum Collections for accreditation purposes. This means that those elements of the

Library Collections that fulfil the criteria for admission to the Museum Collections will be cared for under the terms of our main collection policies, plans and procedures. This will help to not only ensure that the highest standards of collections care are maintained, but that opportunities to apply for project funding for the Library collections are made available.

Accreditation now demands that Museums have policies to cover not only Collections Development, but also Care & Conservation, Documentation, Access and Environmental Sustainability. In addition we have revised our Care & Conservation and Documentation Plans to include the Library Special Collections and hope to create a Collections Development Plan as a result of an active collecting policy. To assist the transition from a paid staff to volunteer facilitated

### **Museum displays**

Following the proposed redevelopment of the front of house, we hope to fund raise for a Museum re-development programme. The current Museum is now over ten years old and whilst significant modifications have been made, it is in need of updating. All funding options will be considered, including Heritage Lottery Fund as we look to make better use of the collections as sources of inspiration, learning and enjoyment.

### **New Forest E-cademy**

As a project within the LPB, we hope to establish an on-line information portal for the New Forest. In partnership with neighbouring universities and other interested organisations, we plan to digitise and make available a high percentage of our library and museum collections over the four year period of the project. In doing so we will open up volunteer opportunities and grow our audiences.

### **Museum accreditation**

Museum accreditation is now run on a three year cycle and we will be due to submit a return in 2017.

<b>Aim 4</b>	<b>We aim to develop, document and care for our collections in line with the standards laid down by museum accreditation, ensuring that they are held in perpetuity for future generations</b>	
<b>4.1</b>	Develop a collections rationalisation toolkit and undertake a collections rationalisations programme for the Museum and Library Collections in preparation for a Collections Development Plan	2015-16
<b>4.2</b>	Document, conserve and care for our collections in line with our Documentation and Collections Care Plans and Procedures 2014-17 and review prior to accreditation return in 2017	Ongoing
<b>4.3</b>	Revise and develop documentation in preparation for the Museums Accreditation return in 2017	2015-17

<b>Aim 5</b>	<b>We aim to interpret our collections through our museum displays and provide opportunities for greater access, creative learning and inspiration</b>	
<b>5.1</b>	Develop an interpretation plan based on our collections for new Museum displays that will better meet the needs of our visitors	2016
<b>5.2</b>	Actively collect, research and prepare objects for permanent display through new Museum displays, temporary display through our exhibitions programme and handling collections for use by the Education Team	By 2018 and ongoing
<b>5.3</b>	Display and interpret objects in new Museum displays, temporary exhibitions and handling collections monitoring their environmental conditions and ensuring safe handling.	By 2020 and ongoing
<b>Aim 6</b>	<b>We aim to create increased access to our collections, through digitisation processes and the development on an on-line information portal</b>	
<b>6.1</b>	Conduct a cataloguing and digitisation programme for the Museum and Library collections as part of the E-cademy project, developing a Digitisation Policy as part of the process	2016-20
<b>6.2</b>	Develop the E-cademy on-line portal based on the Library collections that links to partner organisations and information data	2016-20
<b>6.3</b>	Facilitate information networks via the E-cademy portal and identify areas of potential research through dialogue and as a result of data gaps	2016-20

**Associated plans:**

- Collections Care and Conservation Plan 2014-17
- Collections Documentation Plan 2014-17
- Collections Development Plan – to be drafted 2016
- Library Development Plan 2015

### **7.3 Organisational health**

*‘We are responsible, responsive and resilient.’*

**Financial sustainability**

The need to be financially sustainable has never been more important than at present. Many posts are grant funded meaning that the Centre engages in a continual cycle of fundraising simply to maintain current levels of service delivery. AIM has developed two toolkits, Economic Impact and more recently, Advocacy which are designed to aid small independent museums demonstrate their value to the local community, both in terms of their financial contribution to the local economy as well as the contribution they can make to health and wellbeing.

### Volunteer development

The costs of maintaining a building and a high level of service delivery have meant that reserves have been drained and the trustees have looked to develop a new business model for the future, one that continues to deliver the key aims of the charity but in a way that is sustainable. As part of this process, the Library has ceased to be manned by trained librarians and now operates on a volunteer facilitated basis. We hope that over the coming months we will be able to increase public access and to make the Library available to school groups and other user groups. We also hope to build on our team of Gallery Stewards to assist with visitor information needs at Front of House.

### Project funding

In addition, we periodically apply for funding for specific projects and are currently in the process of developing a number of different projects under the Heritage Lottery Funded LPS, led by the NPA.

### Trading company

Income generating opportunities are being explored and as a result of funding from the NPA as part of the IVS scheme, we have been fortunate enough to employ a retail consultant. This has already resulted in an 11% increase in sales over the period of the consultancy. A phased shop refurbishment as part of the IVS, will we hope result in even greater turnover and increased museum admissions.

<b>Aim 7</b>	<b>We aim to create a financially resilient organisation that continues to fulfil its charitable purposes in creative and sustainable ways</b>	
<b>7.1</b>	Continue to fundraise through trusts, foundations and individual donors for Trust revenue expenditure including salary as expressed through a Fundraising Plan	2015 an ongoing
<b>7.2</b>	Increase shop and museum income through the Integrated Visitor Services scheme and continue to maximise shop income as a result of ongoing retail consultancy and through the creation of a Retail Business Plan	2015 and ongoing
<b>7.3</b>	Project fundraise and secure sponsorship for new museum displays and service delivery projects. Conduct AIM Economic Impact and Advocacy toolkits in support of fundraising.	Ongoing
<b>Aim 8</b>	<b>We aim to ensure an efficient, safe and healthy environment for our staff, volunteers and visitors and to ensure the long term security and sustainability of the collections</b>	
<b>8.1</b>	Continue to develop our emergency preparedness and security plans and undertake training as required in partnership with regional museums	Ongoing
<b>8.2</b>	Develop IT and other organisational systems in line with best practice and within capacity	Ongoing

<b>8.3</b>	Implement safe, efficient and sustainable practices within the organisation and promote green energy solutions to our audiences	Ongoing
<b>Aim 9</b>	<b>We aim to develop our personnel and to promote diversity and skills development among our trustees, advisors, staff and volunteers</b>	
<b>9.1</b>	Continue to recruit, train and retain volunteers as advisors, Gallery and Library stewards and cataloguers and in response to funded projects e.g. New Forest E-cademy	Ongoing
<b>9.2</b>	Continue to rationalise staffing in response to financial and efficiency needs and in line with our charitable purposes	2015-16
<b>9.3</b>	Undertake a review of governance in line with the demands of the Charities Commission and ACE and continue to recruit specialist trustees and advisors	2016

**Associated Plans:**

- Emergency Plan – reviewed annually
- Security Plan – reviewed annually
- Fundraising Plan – to be drafted 2015
- Retail Business Plan – to be drafted 2015

## 8. Implementation of the Plan

### 8.1 Monitoring and development

By reporting progress to the main forums listed below under the key headings of the 2011-14 Development Plan, helped to keep the plan a relevant and vibrant document throughout its lifespan. It is the intention of this plan to follow the same format and to ensure the same cohesive approach is adopted over the next five years. The Operational Plan that accompanies this Development Plan has been set out in such a way as to facilitate this process with clear time scales, responsibilities and realistic and achievable outcomes.

Meetings at which development is reviewed are as follows:

- **Full Trust** – meetings of the full board of trustees who have overall responsibility for the charity's operation (meets Spring and Autumn)
- **Executive Management Committee (EMG)** – meetings of representatives from the NCT, the NPA and NFDC (members, trustees and officers) who have responsibility for overseeing the fulfilment of the association agreement (meets four times a year)

- **Executive Management** – meeting of representatives of the Board of Trustees and Trust officers who have responsibility for the operational management of the Centre (meets six times a year)
- **Trading Company Directors** – meeting of the Board of Directors who have responsibility for the financial operations of our Trading Company (meets six times a year)

In addition, working parties comprising trustees, officers, representatives from partner organisations, volunteers and advisors meet to progress specific areas of development. e.g. income generation, library development etc. They are convened and meet on an as needed basis. At the same time, staff, trustees and volunteers hold operational meetings to progress development plans and oversees day to day issues throughout the year. Specific project meetings are convened on an as needed basis when projects arise.

## 8.2 Key Performance Indicators

Category	KPI	2014	2015-20
Users and their experiences	Number of people visiting Museum	16,267	5% increase year on year
Users and their experiences	Number of people visiting the Gallery	47,599	5% increase year on year
Users and their experiences	Number of people participating in an event	51,631	5% increase year on year
Users and their experiences	Number of unique website users	25,294	5% year on year
Collections	Number of people visiting the Library	227	5% year on year
Collections	Number of objects digitised	Nil	5% of collections year on year
Organisational health	Number of volunteers recruited and trained	20 total number of volunteers	Up to 40 in total by end 2020
Organisational health	Retail turnover	186,249	5% year on year up to £250,000
Organisational health	Museum admissions	28,267	5% year on year

By linking to the SEMuseums benchmarking scheme, we are able to monitor our performance against that of other museums in the south-east region.

## 9. Resources and spending plan

*Forecast budgets to follow*

## 10. Looking forward

The next five years represents an exciting phase in the development of the New Forest Centre. Our first main theme is financial sustainability and the charity is now well on its way towards achieving its goal. Although the Trust has had to take some difficult decisions, it is determined to continue the process. By maximising our trading income, cutting costs and reimagining ways of delivering and improving our services, we are confident that the future of the New Forest Centre is assured.

Our second main theme: access to the collections, builds upon the success of previous decades that have seen the amassing of significant and specialist collections and resources. We now have an opportunity to significantly increase access to our Museum and Reference Library both through the Centre and on-line.

The New Forest Centre is fortunate to have significant support from the New Forest National Park Authority and New Forest District Council. It is unique in its partnerships with both organisations and with other Forest groups and is at the forefront of imaginative service delivery and best practice. Plans will inevitably change and develop throughout the lifespan of this document but its essential message will stay the same.

### ***“Excellent”***

*Something here for all ages, we last came here 25 years ago, we should have returned sooner. Our 2 grandsons aged 5 and 6 were fascinated and ran around answering the quiz questions and all the other activities. We also found it interesting, especially about the part the Forest played in WW1 and WW2.*

**Trip Advisor 20 Feb 20**

## **Appendix 1**

### **SWOT & PEST analysis – November 2013**

#### **Strengths:**

##### Organisational health

- Partnership funding
- Partnership working with NPA education and interpretation teams
- Friendly committed staff and volunteers
- Good staff moral and loyalty
- Good governance and clear purpose
- Increasing number of trustees with relevant skills and competences
- Management very good at listening to staff and volunteers
- Room hire
- Modern building – accessible facilities (reduces risks)
- Good community relations with Lyndhurst Chamber of Trade
- Centre provides a safe environment
- Widening of our own knowledge which then encourages visitors to widen their own
- Willingness to improve and move forward

##### Collections

- Library archives with excellent potential
- Now have a Collections Technician
- Balanced museum content
- Good support from Museum Development Service
- Museum accreditation status
- Great collections and the stories they tell
- Uniqueness

##### Users and their experiences

- Position in car park
- Superb curriculum based education service
- Varied family and adult events programme
- Visitor information service
- Free admission for children
- Wide range of shop goods
- VAQAS status

- Good relations with schools
- Gallery space to promote local artists
- Wide range of skills and knowledge amongst staff and volunteers

## **Weaknesses:**

### Organisational health

- Threat of reduced funding
- Staffing capacity
- Reliance on volunteers
- Operational weaknesses – VIC as separate entity
- Tension created by running two organisations i.e. a museum & library and a visitor centre
- Ageing building and increasing costs of upkeep
- Lack of key posts e.g. front of house visitor services manager, fundraiser and marketing officer

### Collections

- Accessibility of Library
- Static museum displays
- Museum displays not visible from shop area
- Lack of staff to actively develop the collections
- Lack of staff to create interpretative displays and curate exhibitions
- Lack of understanding of long term duty of care to the collections amongst partners

### Users and their experiences

- Location of Lyndhurst – local people avoid it
- Indoor venue only
- Presentation of building doesn't reflect the contents clearly enough
- Lack of publicity creating under developed audiences
- Under developed brand
- Lack of training time
- Lack of a marketing officer
- Over emphasis on young children?
- Museum is not free admission

## **Opportunities:**

### Organisational health

- Links with other National Park Visitor Centres
- Large amounts of training available via the Museum Development Officers and Tourism South East
- Untapped funding sources
- New trustees and volunteers
- Integrated visitor services
- Sustainable transport initiatives
- Redevelopment of outside space
- Develop local crafts in shop and links with Forest Marque
- Opportunities to create commissioned shop products
- Market use of room hire
- Links with Community Centre
- Technology affords new ways of delivering services

### Collections

- Closer Library links with universities and academic institutions
- New museum displays
- Opportunities to market objects by way of souvenirs and commissioned products
- Local history exhibitions
- History story telling events and activities
- Forest Academy and research opportunities
- Extend record series and publication titles
- Charge for research
- Collecting campaigns and expansion of Museum and Library collections
- Use the collections as inspiration for the arts
- Being able to see 'real' objects is our USP

### Users and their experiences

- Wifi within building
- Untapped local audience
- Digitisation of collections
- Develop outreach to local communities to meet our charitable objectives
- Changing National Curriculum affords chance to link with more schools
- Links with nearby cities and conurbations
- Seasonal fairs and fetes
- Visitor refreshments
- More publicity in a variety of places
- Focus education on older children and adults

- Phone apps
- Local creative community of artists and craftspeople
- Additional marketing
- Closer links with other adult groups e.g. U3A

### **Threats:**

#### Organisational health

- Lack of sufficient funding and financial reserves
- Inflation and increasing overheads
- Impact of recession
- Reduction of government funding
- Becoming too thinly spread and losing sight of core purposes
- Long term staff sickness
- Environmental impact e.g. foot and mouth
- Extreme weather and impact on tourism e.g. snow, rain, extreme heat
- Staff shortage and lack of key posts
- Short term nature of project funding
- Mission drift as result of partner funding
- Roll out of pension provision for all staff

#### Collections

- Time taken to care for collections
- Caring for collections is heavy on resources and does not generate income
- Environmental threat to collections within building e.g. pests, fire, flood etc.

#### Users and their experiences

- Significantly raised visitor expectations
- Changes in education curriculum
- The internet as an alternative information source
- Competition from other attractions
- Out of date
- Traffic congestion
- Admission charge to Museum and Library
- Car park charges

### **Political:**

- Government cuts results in partnership funding cuts
- Free admission to national museums casts fee paying independents in a bad light
- Foreign tourist trade affected by environmental factors, e.g. foot and mouth

**Economic:**

- Economic climate affects visitor spend
- Cost of car travel is a barrier for some

**Social:**

- Museums sometimes seen as old fashioned by older generations
- Teens and young adults do not connect to museums
- Media organisations work on short time frames that do not allow for pre-planning and museum tie-in

**Technological:**

- Technology has created alternative forms of entertainment
- Technology can create access to collections and offer opportunities for new forms of income

## Appendix 2

Benefits	Indicators of Success	
Continued development of museum content and branding to reflect the Centre's role as 'the National Park Visitor Centre'	<ul style="list-style-type: none"> <li>▪ Content development that reflects National Park purposes e.g. relevant acquisitions or changes to displays. e.g. WW2 display as part of HLF project funding</li> <li>▪ Branding that reflects the Centre's role as the National Park Visitor Centre e.g. signage, literature, staff badging</li> <li>▪ Regular reports through EMG on visitor numbers and levels of understanding and enjoyment of the special qualities of the National Park</li> <li>▪ Working towards or achieving minimum standards expected of National Park Centres</li> </ul>	<ul style="list-style-type: none"> <li>▪ WW2 display installed 2013</li> <li>• What's On Guide, adverts and posters reflect role</li> <li>• Quarterly reports given at EMGs</li> <li>• Standards achieved through Museum and VAQAS accreditation</li> </ul>
An outreach programme that reaches new audiences and reflects the role of the Centre as the information hub of the New Forest	<ul style="list-style-type: none"> <li>▪ Attendance at major visitors attractions during peak visitor season</li> <li>▪ Attendance at community days e.g. Volunteers Fair and other occasional events</li> <li>▪ Hosting visits by Mosaic community champions</li> <li>▪ Progressing the New Forest Academy</li> </ul>	<ul style="list-style-type: none"> <li>• Attendance at New Forest Show only</li> <li>• Attendance at Volunteers Fair etc.</li> <li>• Visits hosted</li> <li>• E-cademy now in development phase as part of LPS</li> </ul>

Benefits	Indicators of Success	
An events and exhibitions programme that features National Park themes	<ul style="list-style-type: none"> <li>▪ Joint events programme with visible National Park themes</li> <li>▪ Special event for National Parks' Week</li> <li>▪ A number of NPA curated exhibitions e.g. Open Art Exhibition and WW2</li> </ul>	<ul style="list-style-type: none"> <li>▪ Joint events include Discovery Days, talks in connection with NPA staged exhibitions</li> <li>▪ Annual National Parks Day staged in partnership</li> <li>▪ Annual Open Art and project specific exhibitions staged e.g. WW2 in partnership</li> </ul>
An education programme that features National Park themes	<ul style="list-style-type: none"> <li>▪ Joint education sessions with visible National Park themes</li> <li>▪ Partnership working on themed educational events</li> </ul>	<ul style="list-style-type: none"> <li>▪ Regular Education Team led sessions delivered in partnership</li> <li>▪ Themed Discovery Days and children and young people's group sessions developed in partnership</li> </ul>
Opportunity for a National Park Ranger to provide a visible presence for the National Park at the Centre	<ul style="list-style-type: none"> <li>▪ Agreed number of days when National Park ranger can be 'in residence' at the Centre</li> <li>▪ Integration of ranger into Centre's offer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Not developed</li> <li>• Not developed</li> </ul>
Agreement to co-operate in developing and running mutually beneficial income generation schemes	<ul style="list-style-type: none"> <li>▪ Continuation of retail small range of National Park branded items as required</li> <li>▪ Assisting in the trial of new initiatives</li> </ul>	<ul style="list-style-type: none"> <li>▪ Last batches of NPA stock now in process of being retailed through the shop</li> <li>▪ No longer applicable</li> </ul>
Continuation of free entry for under-16s (underwritten by approximately £8k per annum of the National Park Authority funding)	<ul style="list-style-type: none"> <li>▪ Regular reports through EMG on impact of free entry for under-16s on visitor numbers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Reported as part of Key Performance Indicators</li> </ul>

