

# Agenda

## Joint Museums Committee

**Wednesday, 15 March 2017, 2.00 pm**  
**The Commandery, Worcester**

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## DISCLOSING INTERESTS

There are now 2 types of interests:  
**'Disclosable pecuniary interests'** and **'other disclosable interests'**

### WHAT IS A 'DISCLOSABLE PECUNIARY INTEREST' (DPI)?

- Any **employment**, office, trade or vocation carried on for profit or gain
- **Sponsorship** by a 3<sup>rd</sup> party of your member or election expenses
- Any **contract** for goods, services or works between the Council and you, a firm where you are a partner/director, or company in which you hold shares
- Interests in **land** in Worcestershire (including licence to occupy for a month or longer)
- **Shares** etc (with either a total nominal value above £25,000 or 1% of the total issued share capital) in companies with a place of business or land in Worcestershire.

**NB Your DPIs include the interests of your spouse/partner as well as you**

### WHAT MUST I DO WITH A DPI?

- **Register** it within 28 days and
- **Declare** it where you have a DPI in a matter at a particular meeting
  - you must **not participate** and you **must withdraw**.

**NB It is a criminal offence to participate in matters in which you have a DPI**

### WHAT ABOUT 'OTHER DISCLOSABLE INTERESTS'?

- No need to register them but
- You must **declare** them at a particular meeting where:  
You/your family/person or body with whom you are associated have a **pecuniary interest** in or **close connection** with the matter under discussion.

### WHAT ABOUT MEMBERSHIP OF ANOTHER AUTHORITY OR PUBLIC BODY?

You will not normally even need to declare this as an interest. The only exception is where the conflict of interest is so significant it is seen as likely to prejudice your judgement of the public interest.

### DO I HAVE TO WITHDRAW IF I HAVE A DISCLOSABLE INTEREST WHICH ISN'T A DPI?

Not normally. You must withdraw only if it:

- affects your **pecuniary interests OR** relates to a **planning or regulatory** matter
- **AND** it is seen as likely to **prejudice your judgement** of the public interest.

### DON'T FORGET

- If you have a disclosable interest at a meeting you must **disclose both its existence and nature** – 'as noted/recorded' is insufficient
- **Declarations must relate to specific business** on the agenda
  - General scattergun declarations are not needed and achieve little
- Breaches of most of the **DPI provisions** are now **criminal offences** which may be referred to the police which can on conviction by a court lead to fines up to £5,000 and disqualification up to 5 years
- Formal **dispensation** in respect of interests can be sought in appropriate cases.

**Joint Museums Committee**  
**Wednesday, 15 March 2017, 2.00 pm, The Commandery,**  
**Worcester**

**Membership:** Roger Berry, Worcester City Council  
Mr A N Blagg, Worcestershire County Council  
Mrs L C Hodgson, Worcestershire County Council (Chairman)  
Mr G Williams, Worcester City Council

**Agenda**

<b>Item No</b>	<b>Subject</b>	<b>Page No</b>
1	<b>Named Substitutes</b> To receive details of any member nominated to attend the meeting in place of a member of the Committee.	
2	<b>Apologies/Declarations of Interest</b> To invite any member to declare any interest in any items on the Agenda.	
3	<b>Confirmation of Minutes</b> To confirm the Minutes of the meeting held on 9 November 2016 (previously circulated – pink pages)	
4	<b>Commandery Business Plan Update</b>	1 - 28
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Date of Issue: Friday 3 March 2017

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**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**COMMANDERY BUSINESS PLAN UPDATE**

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**Recommendation**

1. **The Museums General Manager recommends that the Joint Committee:**
  - a. **Note the progress made in preparing the Commandery for the relaunch of the building's visitor offer following the capital investment.**
  - b. **Approve the update to the business plan for the Commandery for 2017-18 and authorise the revisions to the detailed Commandery budget as set out in the report.**

**Background**

2. On 14 September 2016 the joint committee received a progress report on the Commandery project, pending further reports to the City Council about the scope and project costs. On 25 October the City Council's Cabinet approved a revised phasing and cost plan for the Commandery development and gave authority to proceed with phases 1 and 2; the latter has since been subject to a successful bid to the Heritage Lottery Fund.
3. The approval of detailed business plans and budgets are matters for decision by the Joint Committee. The proposals were originally based on an outline business plan by DCA Associates, previously approved by this committee in March 2015. Significant progress has been made since then to refine the operational requirements and projections for the Commandery and to meet the strategic objectives set out in the original report; these will apply from the relaunch and completion of the first phases in 2017. In particular the requirements for marketing, events, learning, weddings and corporate hires have been the subject of further assessment and details of these work streams are set out in the supporting document.
4. The update draws together all the work that has been completed, with a view to establishing a working budget for the 2017-18 year and more accurate projections for future financial years. These continue to demonstrate revenue savings through growth in income arising from the investment in the visitor experience and associated building works.
5. The detailed budget is based on revised modelling of admissions figures from a starting point of 3 months into the new financial year. The net budget for the Commandery in 2017-18 remains the same, while the revised projections provide for a reduction in running costs in future to match those set out in the DCA report. Income in Year 3 is marginally greater than the original forecasts, with the prospect of further growth in income in future years.

6. These projections will provide a starting point for financial planning in the medium term, including any requirements for savings from the member authorities. This will be subject to a further report to the committee later this year.

### **Contact Points**

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### **Supporting Information**

Appendix 1 - Commandery Business Plan Update 2017-20

Appendix 2 - Commandery Activity Plan

### **Background Papers**

In the opinion of the proper officer (in this case the Museums General Manager) the following are the background papers relating to the subject matter of this report:

DCA Development and Business Plan for the Commandery July 2015

**Business  
Plan  
Update  
2017-20**



## 1. INTRODUCTION – "IT HAPPENED HERE"

"The Commandery – It Happened Here" is a programme to transform the Commandery as a visitor attraction and to contribute to a combined Civil War and Heritage City offer which will develop Worcester's visitor profile both in the UK and overseas.

It is based on the most thorough programme of research into heritage tourism commissioned in the City and County and builds on outline development and business planning carried out in 2015. This document is intended to bring those business plan assessments up to date and to provide further details on the design approaches adopted by the project team. The scope and scale of the project has now been extended thanks to support from the Heritage Lottery Fund, Arts Council England and other funders; it now includes a range of work to the building fabric alongside the interpretation programme to ensure a high quality of visitor experience.

## 2. CIVIL WAR CITY

The new Worcester City Plan for 2016-21 makes clear the importance of heritage in the City Council's vision for Worcester over the next five years. As part of that vision it wishes to see Worcester's role in the English Civil Wars being more widely recognised, with increasing international awareness of the visit of US Presidents Thomas Jefferson and John Adams in 1786.

A detailed assessment of the Worcester and Worcestershire Civil War product by TSE Research in 2014 identified the market potential for Civil War heritage and the importance of rooting this in a wider Heritage City concept to increase its appeal.

*"The combined Civil War and Heritage City offer we believe could be the concept from which to develop and market Worcester's visitor profile. The Civil War giving it an undeniable USP, in terms of direct English Civil War themes but also encompassing the additional USP provided by the US Presidential and democracy links"*

The Commandery redevelopment addresses the underdeveloped product issues identified in the report, creating greater visitor resonance in line with audience development research and providing more opportunities for educational visits. A new Civil War heritage trail will also help to reinforce this message and link together sites with Civil War connections in the City Centre.

The task of making inroads into domestic and international markets is best met by a collective approach, led by those with overall responsibility for tourism. Museums Worcestershire currently supports this activity through:

- Membership of the Battle of Worcester Heritage Partnership
- Work with Battle of Worcester Society to host and promote specific events
- Hosting of the Love Worcester events at the Commandery

- Partnership working with the Sealed Knot to support future living history events and re-enactments
- Commemoration of Oak Apple Day
- Contributing to City wide initiatives on related themes e.g. Liberty and Democracy programme for the Magna Carta anniversary

The completion of the Commandery's redevelopment will allow for new initiatives including:

- Closer working on Civil War tourism with other UK attractions
- Development of specific tours linked to the Presidents' visit
- Support for increased ancestral tourism linked to the Scottish armies who fought for Charles at the Battle of Worcester

### 3. THE COMMANDERY MASTERPLAN

Museums Worcestershire has appointed award winning exhibition designers GuM who have developed a new master plan for the building, with new Civil War displays at the heart of phase 1 as originally agreed. The development of a master plan for the building has refined the approach to the creation of a new visitor offer for the Commandery, in the light of previously commissioned studies on the tourism potential of the City's Civil War history.

This has in turn provided a structured approach to maintenance issues and ensured that the planned capital investment on interpretation is supported by essential works on the building fabric. The master plan for the Commandery now consists of 5 phases:

<p><b>Phase 0: Commandery Visitor Experience Maintenance Works</b></p>
<p>General fabric repairs, improvements to decoration, renewal of fire protection and heating improvements in advance of visitor experience and interpretation works.</p>
<p><b>Phase 1: Worcester – the Civil War City</b></p>
<p>A series of linked garden wing displays will tell the story of Worcester's part in the English Civil Wars, the key historical figures and the significance of the conflict in helping to shape our Parliamentary democracy.</p> <p>The façade of the building will include a new display of pikes above the gates which will be opened to provide a new entrance into the courtyard.</p> <p>To the rear of the building a new The Commandery Civil War study centre will be established including a library, research and volunteer facilities. The shop displays and stock will be refreshed to reflect the change of theme and reception for group visits will be enhanced in the canal wing.</p>

<b>Phase 2 - "It happened here"</b>
A new light and projection display in the Great Hall to introduce the significance of The Commandery to visitors, plus the story of the visit of US Presidents John Adams and Thomas Jefferson in rooms overlooking Fort Royal Park.
<b>Phase 3 - Commercial and visitor services</b>
The creation of a new café in the front of the building facing the street the courtyard and canal, with the relocation of retail and admission point nearer the Great Hall entrance. The establishment of a high quality wedding and corporate hire suite of rooms on the ground floor with an independent entrance. The creation of temporary exhibition space
<b>Phase 4 - Future interpretation</b>
Completion of the interpretation plan concentrating on Medieval and Tudor Worcester.

Phases 0, 1 and 2 are currently at tender stage with a target completion date of June 2017.

The following benefits were identified at the start of the first phase of the project:

- An improved visitor offer linked to the Battle of Worcester story and the visit of the US Presidents, already identified in previous reports on the visitor economy as having the potential to help draw international visitors and reinforce the Civil War City message
- a better offer for schools, particularly at Key Stage 3
- significant opportunities to generate additional income from admissions income, linked to a review of pricing structures, and to increase the number of visitors from all categories, including international audiences
- re-configuring and re-stocking the shop to fit better with the new interpretation plans (as a priority to result in an increase in spend per visitor)
- An increase in the number of weddings and other events to make a contribution of up to £15K per annum.
- Associated heating and environmental improvements in the spaces allocated for displays to improve the experience for visitors and the care of collections.
- Overall, a reduction in building running costs of £37K.
- Generation of an additional income of c£64k by year 3

These figures have been reviewed and amended in this business plan to take account of further work to refine the proposals and develop delivery plans for each area. Details of the revised revenue projections are provided at the end of this document.

Phases 3 and 4 require further feasibility work and assessment, particularly in relation to the relocation of services for a new catering offer at the front of the building. Subject to further investigation, it ought to be possible to achieve completion, even with an external fundraising phase, on or before Easter 2020.

#### 4. THE 2017 CAPITAL PROJECT

The development of the Commandery as a revitalised visitor attraction rests on the transformation of the visitor experience and in particular the success of the new interpretation scheme. The key elements of this change are:

- The creation of a hub on which *Worcester the Civil War City* can develop to bring more visitors to Worcester.
- Communication of the key message that an important moment in history happened on this spot.
- Strongly multi-sensory, multi-levelled engaging displays and interpretation, providing most visitors with an experience of approximately 45 minutes to 1 hour dwell time.
- Participatory, dramatic and enjoyable interpretation that can be enjoyed socially as a group with little or no prior knowledge of this period of history.
- Signposts and opportunities for deeper exploration into the historical research and detailed stories for visitors who are interested.
- Design solutions that exploit and enhance the atmosphere of the Commandery's historic spaces.
- Design solutions that are robust enough to withstand the Commandery's range of temperature and other environmental challenges.
- Communication of the key stories even if high-tech elements of the design are temporarily out of order.
- The first stage of improvements for the Commandery site, with future opportunities for more.

The exhibition design package is supported by a programme of works to the fabric which have been designed to support the enhancement of visitor facilities and future income generation. This programme consists of:

- Building fabric investigation and repair works
- Creation of a new pedestrian entrance and signage
- Electrical and lighting upgrades
- Fire and Security System upgrades
- Replacement of heaters
- Redecoration and minor works

Listed Building Consent for the above works was granted in February 2017.

## 5. MARKETING AND AUDIENCE DEVELOPMENT

The marketing plan for the Commandery is built on a substantial research and consultation programme.

In 2013 Museums Worcestershire commissioned a significant body of research (funded by Arts Council England) into the potential of the English Civil War heritage to provide an overarching theme for the Commandery as a visitor destination. The research examined the current visitor experience at the historic site from the perspective of existing and future visitors, evaluated pilot interpretation with these audiences, identified potential future visitors to engage with a Civil War product and quantified the wider Civil War history that exists in Worcester. These studies included:

- English Civil War in Worcestershire, TSE Research (Jan 2014)
- Strengthening Museums and the Visitor Economy in Worcester, TSE Research (March 2014)
- Audience research and evaluation of pilot interpretation, MHM (March 2014)
- The Commandery Pricing Plan, Blue Sail (March 2014)
- The Commandery Marketing Strategy, Blue Sail (March 2014)
- Heritage Product Development Final, TSE Research (April 2014)

As a result of this work, the strategic marketing aims identified for the site are:

- To ensure the Commandery sits at the core of the tourism offer for Worcester as the "English Civil War City"
- To increase income for The Commandery to ensure its sustainability and reduce its reliance on public sources
- To maximise the potential of the investment in the interpretation and visitor experience which will be offered by The Commandery

The strategic objectives to support these aims are:

- Present a clear and compelling proposition for the Commandery which can be used directly by Museums Worcestershire and by its partners and others in promoting the Commandery
- Increase income to the Commandery by increasing visitor numbers and spend from targeting marketing at best prospect segments
- Develop a small number of partnership initiatives to enhance the Commandery's appeal for specific markets, extend reach and exploit additional channels

Using the research conducted for the study "Strengthening Museums and the Visitor Economy" and knowledge of the City's visitor markets, the market segments identified to deliver the best return on investment and with the greatest potential for growth are:

Leisure	Day trips within 45 minutes travel time
	Special interest groups from the UK and USA
	Staying visitors in Worcestershire
Education	Educational groups within 60 minutes travel time

Events	Worcester residents
	Day trips from within 30-45 minutes travel time
Weddings	Worcester residents
	Within 30-45 minutes travel time
Corporate events and functions	Worcester companies and organisations
	Companies and organisations within 30-45 minutes travel time

As a part of its reimagining and repositioning project, a new brand was considered an essential element in the relaunch of the Commandery visitor experience. The intention is to create a strong identity to permeate all marketing channels, reinforcing key messages about the visitor experience and signalling change to stakeholders and previous visitors.

Modus of Worcester were appointed in 2016 to develop a brand and following a series of workshops and focus group, with key partners and users, the following name and proposition was agreed:

**The Commandery Worcester**

Civil War Battle HQ & Historic Building

*Bringing to life tales of treason, treachery and tragedy in this beautiful building with a bloody past, in the heart of historic Worcester where the English Civil War began and ended.*

A visual identity with a series of flexible applications was then developed to reflect different strands of the Commandery offer, utilising a colour palette inspired by Civil War uniforms and equipment.

The outline development plan produced by DCA Consulting and approved in 2015 identified the following as immediate priorities: branding and visual identity development and implementing phase 1 of a phased marketing strategy leading up to a relaunch.

The budget included a £32,000 one –off investment for brand development, website development and a marketing campaign before opening the new facilities. These are now all planned or already in place, supported by a part-time post of marketing assistant. This post will need to continue as part of the Commandery's core team, if the financial benefits of the Commandery investment and its impact on the visitor economy are to be realised. The costs of this post have therefore been included in the revised salary budget for 2017-18 and future years' projections.

## 6. EVENTS

The Commandery's events programme has an important role to play in supporting the refurbishment and repositioning plans for the Commandery in the years ahead. The redesign of the building has included an evaluation of space requirements for activities; the new interpretation plan will place limits on the rooms available to accommodate large scale events in future, as will the dedicated space provided on the ground floor of the garden wing for weddings and corporate hires.

Events have a key role to play in driving up repeat visits and providing a focus for marketing campaigns and collaborative work with other heritage sites. The new budget includes a small uplift for events and re-enactments to ensure the programme is of high quality. This will be supported by an ongoing fundraising drive and the Commandery has received offers of financial support and help in kind from the Worcestershire Ambassadors and the Sealed Knot for 2017.

## 7. LEARNING AND COMMUNITY LINKS

The original development report by DCA identified significant opportunities to increase visits by school parties. These are to be built around the core offer of programmes to link to local history studies as part of the History Curriculum for Key Stages 1 and 2, as well as more opportunities to link explicitly to the curriculum at Key Stages 3. These cover the development of the Church, State and Society in Britain 1509-1745. Examples include the causes and events of the Civil War throughout Britain, which is central to the new interpretation, planned for the building and associated trails.

The Commandery has twice received the Sandford Award for Heritage Education, a sign of the quality of staff engagement and facilities in the building. The latter have been reviewed as part of the current spatial planning exercise to continue to offer the facilities needed to host school groups and to deliver an extended programme in future.

The main elements of this programme planned for 2017-18 are:

- Civil War Theatre performances for 5 Worcester schools
- Collaborative arts programme for 10 Worcestershire schools
- Development of new resources and education packs for schools
- New marketing strategy and leaflets for schools
- NFC (Near Field Communication) interpretation and tablets for multimedia tours
- Civil War school loans box

All project materials and additional staffing related to the above have been funded through grants from Arts Council England and the Elmley Foundation. The delivery has also been designed to fit in with the current Commandery Interpretation Team's existing roles in order to avoid additional staffing costs. Further details illustrating how the Commandery's learning offer fits into the wider project are set out in the appendix.

The scale of the learning programme in future years will be subject to further fundraising but will encompass the following areas from 2019 onwards:

- Redevelopment of Monastic and Tudor school sessions
- Staff and volunteer training
- Full delivery and launch of the new education offer
- Full education marketing provision

Museums Worcestershire has well established links with the Battle of Worcester Heritage Partnership, and the Battle of Worcester Society; in addition the Commandery team work closely with community groups like the Friends of Fort Royal Park and the Commandery Gardens.

## 8. RETAIL AND CATERING

Following the adoption of the DCA recommendations, a small allocation of £7K was made available to reconfigure and restock the Commandery shop. Work to improve visual merchandising and to stock a relevant range of items linked to the new offer was started in the autumn of 2016. This brought immediate results, a 30% uplift in turnover for December compared with the same period in the previous year. Retail income is heavily dependent on footfall to the site however, so any increase will only be sustained and developed once the new displays are launched.

The presence of a Commandery café through the summer months has brought significant benefits, although catering of itself will not generate significant direct income. It also helps to reinforce links between the Commandery and Fort Royal Park users, as well as increasing dwell time for visitors to the building. At the time of writing a new operator is being sought for 2017. At the same time the Commandery team have also sought to improve refreshments for evening events e.g. the Commandery lecture programme, establishing a small bar in rooms off the Great Hall. The development of weddings will also impact on the requirement for high quality catering on site in due course.

The new master plan proposes that the locations for catering and admissions/retailing are switched in the canal wing, with the café moving to a street facing location and outside seating provided in the courtyard. A new admissions point would be established near to the Great Hall. These remain untested plans until further work is done so the current proposals to gradually improve shop sales and the catering offer in their existing locations will be pursued in the short to medium term.

## 9. CORPORATE HIRE AND WEDDINGS

The Commandery has been available as a venue for hire for many years; among the existing uses are Fright Nights, Ghost Walks and Shakespeare at the Commandery, and occasional lectures and performances. The building is also available for wedding receptions and there were 3 bookings in 2016.

The DCA report identified the potential for greater income generation, providing the following issues could be addressed as part of the scheme:

- Improving the heating and environmental conditions to extend the use of the building in colder months
- Allocating space away from the visitor route for private bookings and smaller wedding receptions
- Exploring the potential for holiday lets in the garden wing
- Providing additional staffing to promote the offer and to manage wedding bookings, to ensure customers receive a high quality of customer care and support.

The initial costs of converting part of the building for holiday lets were deemed to be prohibitive but the other issues are part of the current plans. The proposals for building works and visitor flow have been addressed in the capital scheme and a newly redecorated weddings suite will be located on the ground floor of No 1 Commandery Drive, to give wedding parties a dedicated space for smaller ceremonies or somewhere to gather in advance of larger receptions in the Great Hall or the Commandery Gardens. An initial wedding package is being launched in October 2017, using the allocation of £15k included in the capital plan. Further work is planned to the rest of the wedding suite once further funding can be secured.

Preparations for securing a 3 year weddings licence are now complete and a pricing structure was agreed by the joint museums committee in November 2016. A job description for a part-time wedding coordinator has been developed and the provisional costs for this post included in the budget from September 2017. A weddings brochure with high quality images of the newly refurbished spaces will be produced in October 2017.

The target income from weddings and corporate hire is estimated to be £44,700 (less VAT) by Year 3, based on the following increase in bookings:

2017/18 - £12080 (part year)

2018/19 - £23,560 (4 full price and 2 smaller hires)

2019/20 - £32,740 (6 full price and 5 smaller hires)

2020/21 - £44,700 (10 full price and 7 smaller hires)

## 10. MANAGEMENT AND STAFFING

The Commandery is one of four sites managed by Museums Worcestershire and benefits from management, specialist and technical expertise available across the shared service. The building and its team are led on site by David Nash, the Commandery Manager and Museums Worcestershire's Curator of Social History.

The Commandery's team was restructured in 2015 to provide a more focussed approach to interpretation and learning and a more robust structure to respond to forthcoming increases in visitor numbers. Members of the team have a specific brief to provide face to face interpretation to visitors, groups and schools and these skills will enhance the visitor experience alongside the forthcoming improvements in display.

The current establishment is as follows:

<i>Name</i>	<i>Post</i>	<i>Hours pw</i>
David Nash	Commandery Manager	35
Sarah Bourne	Events and Visitor Services Officer	30
Jo Willis	Interpretation and Learning Coordinator	30
Oliver Carey	Museum Attendant	28
Kerry Whitehouse	Interpretation Assistant	16
Carol Campbell	Interpretation Assistant	20
Alex Bear	Interpretation Assistant	13
Mandy Fretwell	Finance and Clerical Assistant	21
Shelagh Allen	Retail Assistant	22
Post vacant	Retail Assistant	22

## 11. PROJECT COSTS AND FUNDING

The cost plan for the following elements of the project in phases 0-2 were approved by the City Council in September/October 2016:

	Total £
Exhibition improvements	184806
Environmental works	38188
Building maintenance and improvements	120000
Marketing	30500
Weddings and Retail	22500
Activity Plan	5000
Design Fees	88000
Lighting	7800
Preliminaries/Contingency/Fees	57400
<b>TOTAL</b>	<b>554194</b>

In addition to the core funding from Worcester City Council, the project has been awarded the following grants and donations:

	Total £
Heritage Lottery Fund	96000
Worcestershire County Council	50000
Arts Council England	28504
Friends of Worcester Museums	5000
Battle of Worcester Society	1000
Worcestershire Ambassadors	500

## 12. INCOME AND EXPENDITURE FORECAST

### The Commandery

EXPENDITURE	2016-17	2016-17	2017-18	2018-19	2019-20	
	Budget	Projected	Budget	Budget	Budget	
Salaries incl on costs	118180	119229	139790	147540	149015	1
Pay protection (3 years)	3310	3310	3310	0	0	
Casuals and overtime	13100	15613	15500	17100	17100	2
Insurance (staff related)	874	874	870	1000	1000	
<b>Staff sub-total</b>	<b>135464</b>	<b>139026</b>	<b>159470</b>	<b>165640</b>	<b>167115</b>	
<b>Overheads</b>						
Cleaning (windows and materials)	2000	2000	2200	2400	2600	3
Stock for shop	7600	6487	8000	9000	10500	4
Exhibitions	3400	2100	3400	3400	3400	
Equipment and materials	1800	1650	1800	1800	1800	
Events expenditure	1800	1800	5000	6000	7000	5
Stationery	2700	1200	2200	2700	2700	
Communications (post )	2500	2500	2500	2500	2500	
Communications (Telephone)	2700	1300	1700	1700	1700	
Marketing	7300	7300	10000	13000	15000	
Other Fees (Licences, VAQAS)	800	900	1000	1000	1000	6
Securicor	1000	1417	800	1000	1000	
Travel and subsistence	300	68	300	300	300	
Bank charges	500	500	500	500	500	
<b>Overheads sub-total</b>	<b>34400</b>	<b>29222</b>	<b>39400</b>	<b>45300</b>	<b>50000</b>	
<b>EXPENDITURE TOTAL</b>	<b>169864</b>	<b>168248</b>	<b>198870</b>	<b>210940</b>	<b>217115</b>	
Admissions	23400	22830	37500	48800	63300	
Educational visits	13000	8900	10200	12100	15250	
Hires and events	10000	10000	12500	23560	32740	
Retail sales	17000	11518	17200	20000	23500	
Café income	0	366	1500	2500	3500	
Donations and miscellaneous	1100	823	1800	1900	2100	
Marketing one -off support			12500			
<b>INCOME TOTAL</b>	<b>64500</b>	<b>54437</b>	<b>93200</b>	<b>108860</b>	<b>140390</b>	
<b>NET EXPENDITURE</b>	<b>105364</b>	<b>113811</b>	<b>105670</b>	<b>102080</b>	<b>76725</b>	

1. Includes p/t marketing post and weddings coordinator (21hrs Sc. 5)
2. Extra casual staffing to support increase in events
3. Additional cleaning to cover events and increased footfall
4. Increased stock in line with income projections
5. Events expenditure increased to provide for three major events annually in Feb./May/August
6. New displays will require PRS licences



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## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
<i>Give us the dates you expect the activity to start and end. Please list your activities in chronological order.</i>	<i>List the individual activities you will do to achieve your project outcomes. Use target numbers where possible.</i>	<i>Tell us where the activity will take place</i>	<i>Tell us who will be responsible for managing the activity (for example, project officer, young people, or a named partner organisation).</i>	<i>Tell us who the activity is aimed at (for example, a particular group of people, local schoolchildren, visitors to a museum etc.).</i>	<i>Explain in detail what you will achieve by doing the activity. Use target numbers where possible.</i>
November 2016	<b>Project start date</b>	The Commandery Worcester	General Manager and project team		
November 2016- August 2018	<b>Commandery project team meetings</b>	The Commandery Worcester	General Manager and Project Leads, Museums Worcestershire	Commandery project team, partner organisations, delivery partners.	Successful management of the project.  Monthly, and at busy times, fortnightly meetings held to keep track of the project, evaluate and resolve concerns.
November 2016	<b>Interpretation and displays</b> Significant loan items for new displays identified and requested  This small number of iconic items, within the context of the new interpretation, will be a particular draw for specialists and visitors, and will be a focus of pride for local residents.	The Commandery Worcester	Senior Curator Museums Worcestershire	Special interest groups  Education visits  Worcester residents  Day trip visitors from within 30-45 minutes	The negotiation of a rotating series of 3 significant loans related to the story of Liberty and Democracy.
November 2016	<b>Visitor experience training</b> Collation of visitor feedback / sharing with staff.	The Commandery Worcester	Marketing & Events Manager, Commandery Manager, Museums Worcestershire	Volunteers and staff at The Commandery and volunteers from partner organisations such as Friends of Fort Royal Park, Battle of Worcester Society, Worcester Re-enactors, Worcester Militia  All visitors	Staff and volunteers with increased knowledge about new interpretation themes and visitor experience.  Improved visitor experience.
November 2016 – December 2016	<b>Digital learning using NFC technology</b> Purchase 16 digital tablet computer units.  Research and collate information.	The Commandery Worcester	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums	Family visitors(with children aged 8-14)  Special interest groups	Improved interpretation and a greater understanding of The Commandery's story and access to collections.  An improved visitor experience, taking on

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
	<p>7 inch digital tablets will use Near Field Communication (NFC) technology to provide a new multi-sensory interpretation tool for visitors.</p> <p>The new system will give visitors access to existing and new content including access to collections and other linked information sources.</p>		Worcestershire	Education visits	<p>board feedback and using it to update and improve current audio guides and route.</p> <p>Accessibility options available through digital systems for visitors with sight or hearing impairment.</p> <p>Provision of information is more than one language.</p>
December 2016 - July 2018	<p><b>Research panel meetings</b></p> <p>Meetings planned to consider, inform and advise on heritage research and interpretation</p>	The Commandery, Worcester	Senior Curator and Commandery Manager Museums Worcestershire	Representatives of Uni Worcester, Battle of Worcester Society and local experts	<p>Twice-yearly consultation throughout the project, with additional as required.</p> <p>Programmes and initiatives developed and delivered with the support of expert advice.</p> <p>Accurate, well researched interpretation and historic events and initiatives.</p>
December 2016	<p><b>Interpretation and displays</b></p> <p>Audio, film making, installation fitters, electrical contractors orders placed</p>	Worcester City Council	Project Manager, Worcester City Council	Project Team	Orders placed for key project elements.
January 2017	<p><b>Interpretation and displays</b></p> <p>Investigate building fabric damp and commission and install new heaters to improve environmental conditions in the new displays.</p>	The Commandery Worcester	<p>Commissioned contractor</p> <p>Worcester City Council conservation officer and project manager</p> <p>Commandery Manager, Museums Worcestershire</p>	<p>Special interest groups</p> <p>Education visits</p> <p>Worcester residents</p> <p>Day trip visitors from within 30-45 minutes</p>	Improved environmental conditions will enable significant objects and documents from the city's collection and loans which were previously unable to be displayed to be exhibited.
January 2017 – March 2017	<p><b>Digital learning using NFC technology</b></p> <p>Upload information and test new equipment</p> <p>Translate key information</p>	The Commandery Worcester	<p>Commandery Manager &amp; Learning, Volunteering and Partnerships Manager, Museums Worcestershire</p>	<p>Family visitors (with children aged 8-14)</p> <p>Special interest groups</p> <p>Education visits</p>	<p>Improved interpretation and a greater understanding of The Commandery's story and access to collections.</p> <p>An improved visitor experience, taking on board feedback and using it to update and</p>

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
					<p>improve current audio guides and route.</p> <p>Accessibility options available through digital systems for visitors with sight or hearing impairment.</p> <p>Provision of information is more than one language.</p>
January – March 2017	<p><b>Leisure focused &amp; staying visitors in Worcestershire marketing activities</b></p> <p>Monthly e-newsletter</p> <p>Local targeted advertising campaign for re-launch</p> <p>Improved presence on Visit Worcestershire website</p> <p>Social media campaign</p> <p>Event and news press releases to various media</p>	The Commandery and Civil War Trails	Museums Worcs marketing team Visit Worcestershire	<p>Worcester residents</p> <p>Day trips from within 30-45 minutes' drive time - predominantly family visitors (with children aged 8-14)</p> <p>local residents for VFR (visiting friends and relatives)</p> <p>Education visits</p>	<p>Increasing visitors by 20% year on year.</p> <p>Increased visitor income.</p> <p>Growing the number of day and stay visitors.</p>
September 17 – March 18	<p><b>Special interest / group travel marketing activities</b></p> <p>Travel Trade campaign supported by web and social media</p> <p>Partnership with special interest tour operator and accommodation sector</p> <p>Developing half and full day group travel 'Worcester Heritage' packages and explore joint ticketing with local partners.</p> <p>Link to Blue Badge Guides in Worcs.</p> <p>Incorporate new heritage trails as a part of the offer.</p>	The Commandery and Civil War Trails	Museums Worcs Marketing Team working with Visit Worcestershire, Visit England and Visit Britain, plus tour, accommodation and heritage partners	<p>Regional special interest groups</p> <p>National and International travellers – especially US</p> <p>Education visits</p> <p>Adults (50-64)</p>	<p>Increasing visitors by 20% year on year.</p> <p>Increased visitor income.</p> <p>Growing the number of day and stay visitors.</p> <p>Increased contribution to Worcester's visitor economy.</p>
February 2017	<p><b>Interpretation and displays</b></p> <p>Re-enactors (volunteers) will help us to create a choreographed film.</p> <p>The film will follow individuals crossing</p>	The Commandery Worcester	<p>Commissioned film-maker</p> <p>Worcester Militia re-enactors</p>	<p>Family visitors (with children aged 8-14)</p> <p>Special interest groups</p>	<p>Film created with support from local re-enactors to be edited for use in the Great Hall interpretation and with group visits and online.</p>

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
	the Commandery's Great Hall, moving through time and bringing The Commandery's past to life.		Commandery Manager, Museums Worcestershire		
February 2017	<b>Interpretation and displays</b> Re-enactors (volunteers) will help us bring to life the story of the visits by John Adams and Thomas Jefferson by recording Adams' speech.	The Commandery Worcester	Commissioned film-maker  Worcester Militia re-enactors  Commandery Manager, Museums Worcestershire	Family visitors (with children aged 8-14)  Special interest groups  Education visits	Recording created with support from local re-enactors to be edited for use in the Presidents Room interpretation and with group visits and online.
February 2017 – April 2017	<b>Visitor experience training</b> Enhanced visitor experience training for staff and volunteers.	The Commandery Worcester	Marketing & Events Manager, Commandery Manager, Museums Worcestershire  Plus input from other city heritage partners.	Volunteers and staff at The Commandery and volunteers from partner organisations such as Friends of Fort Royal Park, Battle of Worcester Society, Worcester Re-enactors, Worcester Militia  All visitors	Staff and volunteers with increased knowledge about new interpretation themes and visitor experience.  Improved visitor experience.
February 2017 – August 2018	<b>Project evaluation</b> Gathering feedback from visitors and stakeholders.	The Commandery Worcester	Marketing & Events Manager, Commandery Manager, Museums Worcestershire	Everyone involved in the project, including HLF and partner organisations	Audience feedback on success of project.  Completed project evaluation report.  Data to inform future development decisions.
March 2017	<b>Interpretation and displays</b> Hamilton Room and Prince Arthur's Pall interpreted to introduce the story of Worcester the Faithful City and its place in the balance between divine right and democracy in England.	The Commandery Worcester	Commissioned display designers  Senior Curator, Museums Worcestershire	Adult visitors (50-64)  Special interest groups  Education visits  Worcester residents	Improved understanding of the heritage of the building, artefacts and City.  Improved visitor experience.  Increased local pride in the significance of their heritage
March 2017	<b>Interpretation and displays</b> <i>Civil War propaganda interactive installed alongside Mercurius Aulicus</i>	The Commandery Worcester	Commissioned display designers	Families (with children aged 8-14)	Improved understanding of the heritage of the building, artefacts and city.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
	<p><i>from museum collection – one of the first English examples of popular partisan journalism.</i></p> <p><i>This copy tells the story of the attempted siege of Worcester when Sir William Waller, Parliamentarian general had flyers scattered through the streets of Worcester recommending the townspeople overthrow the city governors and come over to his side.</i></p>		Senior Curator, Museums Worcestershire	Education visits  Worcester residents	Improved visitor experience.  Increased local pride in the significance of their heritage.
March 2017	<p><b>Interpretation and displays</b></p> <p>Great Hall projection installed revealing scenes re-enacted from Worcester and The Commandery's past and their role in the evolution of democracy, from c.1200 to the present day.</p> <p>Historic copies of Civil War armour cleaned and installed in the Great Hall with introductory interpretation and improved lighting.</p>	The Commandery Worcester	Commissioned display designers  Senior Curator, Museums Worcestershire	Families (with children aged 8-14)  Education visits  Worcester residents  Day trip visitors from within 30-45 minutes	Improved understanding of the heritage of the building, artefacts and city.  Improved visitor experience.  Clearer way finding for visitors.
March 2017	<p><b>Interpretation and displays</b></p> <p>Presidents Room installed, where visitors will be invited into the Queen Anne wing to join John Adams and Thomas Jefferson and the household family for tea in 1786.</p> <p>The room will be furnished in period including artefacts from the museum collection, with a few modern twists where visitors can discover the story of their visit to the 'ground where liberty was fought for' and an insight into the life and minds of the future American Presidents and the words 'Worcester contributed to the Declaration of Independence'.</p>	The Commandery Worcester	Commissioned display designers  Senior Curator, Museums Worcestershire	Families (with children aged 8-14)  Special interest groups  Education visits  International visitors especially US  Worcester residents	Improved understanding of the heritage of the building, artefacts and city.  Improved visitor experience.  Potential for increase in international visitors.  Increased local pride in the significance of their heritage.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
April 2017	<b>Visitor experience training</b> Familiarisation visits for staff and volunteers to and from partner venues.	The Commandery and partner Worcester heritage venues including Worcester Cathedral	Marketing & Events Manager, Commandery Manager, Museums Worcestershire Plus input from other city heritage partners.	Volunteers and staff at The Commandery and volunteers from partner organisations such as Friends of Fort Royal Park, Battle of Worcester Society, Worcester Re-enactors, Worcester Militia  All visitors	Staff and volunteers with increased knowledge about new interpretation themes and visitor experience.  Improved visitor experience.  Increased staff and volunteer understanding of associated heritage sites.
April 2017	<b>Visitor experience training</b> Familiarisation with new displays for staff and volunteers.	The Commandery Worcester	Marketing & Events Manager, Commandery Manager, Museums Worcestershire	Volunteers and staff at The Commandery  Volunteers from partner organisations such as Friends of Fort Royal Park, Battle of Worcester Society, Worcester Re-enactors, Worcester Militia  All visitors	Staff and volunteers with increased knowledge about new interpretation themes and visitor experience.  Improved visitor experience.
April 2017	<b>Digital learning using NFC technology</b> Launch new system with visitors, test and review material	The Commandery Worcester	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums Worcestershire	Family visitors (with children aged 8-14)  Special interest groups  Education visits	Improved interpretation and a greater understanding of The Commandery's story and access to collections.  An improved visitor experience, taking on board feedback and using it to update and improve current audio guides and route.  Accessibility options available through digital systems for visitors with sight or hearing impairment.  Provision of information is more than one language.
14 – 17 April 2017	<b>Activity programme</b> Launch of <i>The Commandery -It Happened Here</i> displays and resources.	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums	Family visitors (with children aged 8-14)	Increased awareness and interest in revitalised Commandery offer.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
	Public launch weekend		Worcestershire, staff and volunteers	Adult visitors (50-64)  Day trips within 45 minutes' travel time	Target: 2000 visitors over weekend.  Increased visitor income.  Increased local pride in the significance of their heritage.
April 2017	<b>Formal learning programme</b> Civil War local schools exhibition competition launched  Advertise to schools.	Local schools	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums Worcestershire	School children and teachers  Worcester Residents	Engagement and consultation with schools.  Improved schools offer. Embedded use of Civil War in local history curriculum at Worcester schools.  Increase in student numbers and income for Commandery.  Partnerships developing use of education loans service and workshops with schools.  Increased knowledge on Civil War among Worcestershire residence and use of exhibitions in heritage.
28 – 30 May 2017	<b>Activity programme</b> Oak Apple Day / Civic (VIP) Launch Event the official opening of It Happened Here displays and resources.  <i>A Right Royal Restoration Celebration on the day that Charles II regained the throne, enjoying a 17th century fete with maypole and dancing,</i>	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	Stakeholders  Councillors  Special guests	Increased awareness and interest in revitalised Commandery offer.  Profile raising.  Increased local pride in the significance of their heritage.  Target: 200 visitors to events.
May 2017	<b>Interpretation and displays</b> New heritage planting programme in the Commandery gardens started, referencing Civil War and presidential visit emphasising Adams and Jefferson as plant collectors.	The Commandery Worcester	Worcester City Council parks team and volunteer group	Adult visitors (50-64)  Special interest groups  Day trips from within 30-45 minutes	Improved external interpretation.  Improved visitor experience.  Opportunity to reach new audience and partners.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
				Garden volunteers	
June 2017	<b>Interpretation and displays</b> Trained staff and volunteers clean eighteenth century Broadwood square piano from museum collection for display as part of the Presidents Room.	The Commandery Worcester	Commandery Manager and team, Museums Worcestershire and Commandery volunteers	Adult visitors (50-64)  International visitors especially family history researchers from the US  Museum volunteers	Interpretation and artefacts that engage visitors with the lives of the US Presidents.  Increase in international visitors.
June 2017	<b>Join England's Heritage Cities consortium</b> Meet criteria and sign up to England's Heritage Cities consortium as the "English Civil War City". <a href="http://www.heritagecities.com">www.heritagecities.com</a>	Worcester City	Visit Worcestershire  Worcester Heritage Partnership  Worcester City Council  Marketing & Events Manager, Museums Worcestershire  Worcester BID	Worcester City tourism and economic development partners and local businesses.  Visitors from wider UK and abroad	Increased national and international PR and marketing opportunities as a member of the Heritage Cities Group.  Increased visitor numbers to Worcester. Increased profile for the City's unique heritage.  More visitors staying overnight in Worcester.
June 2017	<b>Interpretation and displays</b> Buttery display including archaeological artefacts from the site installed enabling visitors to delve deeper into the history of The Commandery and the stories it has witnessed.	The Commandery Worcester	Senior Curator, Curator of Archaeology and Commandery Manager, Museums Worcestershire	Adult visitors (50-64)  Special interest groups  Worcester residents	Improved understanding of the heritage of the building, artefacts and city.  Improved visitor experience.  Increased local pride in the significance of their heritage
July 2017	<b>Civil War trails</b> Three trails, accessed online/phones and through a printed leaflet, in and around Worcester City telling stories and sharing research of Worcester's place in the history of democracy.	Worcester City and surrounding countryside footpaths	Commissioned designers  Commandery Manager and Commandery team	Trails aimed at 3 different audiences: 1. Tourists to Worcester 2. Families 3. Battlefield heritage enthusiasts	Increased public knowledge of the history of Worcester.  Increase in visitor numbers to Commandery and other heritage sites.  Increased knowledge of Civil War heritage among Worcestershire residents.  Increased local pride in the significance of their heritage.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
July 2017 – September 2017	<p><b>Formal learning programme</b> Civil War local schools exhibition on display at Commandery; winner announced at Battle of Worcester event and presented with award.</p> <p>Offer all children that visit with their school a discount voucher to bring their parents at a later date.</p>	Local schools	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums Worcestershire	School children and teachers  Worcester Residents	<p>Engagement and consultation with schools.</p> <p>Improved schools offer. Embedded use of Civil War in local history curriculum at Worcester schools.</p> <p>Increase in student numbers and income for Commandery.</p> <p>Partnerships developing use of education loans service and workshops with schools.</p> <p>Increased knowledge on Civil War among Worcestershire residence and use of exhibitions in heritage.</p>
26 – 28 August 2017	<p><b>Activity programme</b> The Storming of Fort Royal and the Escape of Charles Stuart</p> <p>Living history and skirmish with Worcester Militia and Sealed Knot</p>	The Commandery Worcester	Worcester Militia and Sealed Knot,  Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	Families (with children aged 8-14)  Special interest groups  Day trips from within 30-45 minutes	<p>Increased awareness and interest in revitalised Commandery offer.</p> <p>Increasing visitors by 20% year on year.</p> <p>Increased income from admissions and secondary spend.</p> <p>Target: 1500 visitors over weekend.</p>
3 September 2017	<p><b>Activity programme</b> Drumhead Ceremony</p> <p>On this day 366 years ago, soldiers and civilians fell in the final battle of the English Civil War. In honour of the lives lost in 1651, join us on this special anniversary for a reception in the Great Hall followed by a musket salute and service on Fort Royal Hill.</p>	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	Adults (50-64)  Special interest groups  Worcester residents	<p>Increased awareness and interest in revitalised Commandery offer.</p> <p>Increasing visitors by 20% year on year</p> <p>Increased knowledge of Civil War heritage among Worcestershire residents.</p> <p>Increased local pride in the significance of their heritage.</p> <p>Target: 500 visitors.</p>
10 September	<b>Activity programme</b>	The Commandery	Commandery Manager	Adults (50-64)	Increased awareness and interest in

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
2017	Heritage Open Days: Interpretation Day including Civil War collections handling as a part of this national event.	Worcester	and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	Worcester residents  Day trips from within 30-45 minutes	revitalised Commandery offer.  Increasing visitors by 20% year on year.  Increased knowledge of Civil War heritage among Worcestershire residents.  Increased local pride in the significance of their heritage.  Target: 500 visitors.
23 - 24 September 2017	<b>Activity programme</b> Death, Disease, Deportation and Despair event weekend  Battle of Worcester 1651 The Aftermath	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	Families (with children aged 8-14)  Worcester residents  Day trips from within 30-45 minutes	Increased awareness and interest in revitalised Commandery offer.  Increasing visitors by 20% year on year.  Increased income from admissions and secondary spend.  Increased knowledge on Civil War among Worcestershire residents.  Target: 1000 visitors over weekend.
October 2017	<b>Formal learning programme</b> Civil War local schools exhibition competition legacy resources; teaching materials developed and made easily accessible online to position the Commandery as an ongoing centre of excellence for English Civil War history	Local schools	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums Worcestershire	School children and teachers  Worcester Residents	Engagement and consultation with schools.  Improved schools offer. Embedded use of Civil War in local history curriculum at Worcester schools.  Increase in student numbers and income for Commandery.  Partnerships developing use of education loans service and workshops with schools.  Increased knowledge on Civil War among Worcestershire residents and use of their heritage.

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
February 2018 – May 2018	<p><b>Formal learning programme</b> Local history (Civil War) touring school performance</p> <p>Short historic theatre piece developed to take to 5 local schools.</p> <p>Commission script and actors, purchase costume, identify schools.</p>	Local schools	Commandery Manager & Learning, Volunteering and Partnerships Manager, Museums Worcestershire	Schoolchildren and teachers  Local actors and scriptwriter	<p>Increase in student visitor numbers.</p> <p>Improved schools offer.</p> <p>Use of cross-cultural expertise to bring heritage to life for schools.</p> <p>Engagement and education to local schools on local history.</p> <p>Increased knowledge on Civil War among Worcestershire residents and use of their heritage.</p>
29 May 2018	<p><b>Activity programme</b> Oak Apple Day</p> <p>A Right Royal Restoration Celebration on the day that Charles II regained the throne enjoy a 17th century fete with maypole and dancing,</p> <p>Worcester Militia Living History Camp and period entertainment.</p>	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	<p>Families (with children aged 8-14)</p> <p>Worcester residents</p> <p>Day trips from within 30-45 minutes</p>	<p>Increased awareness and interest in revitalised Commandery offer.</p> <p>Increasing visitors by 20% year on year.</p> <p>Increased income from admissions and secondary spend.</p> <p>Target: 500 visitors.</p>
4 July 2018	<p><b>Activity programme</b> “The Ground Where Liberty was Fought for” special event focusing on the Presidents’ visit</p> <p>Timed to coincide with US Independence Day.</p>	The Commandery Worcester	Commandery Manager and Marketing & Events Manager, Museums Worcestershire, staff and volunteers	National and international heritage tourist	<p>Raising profile of new exhibition targeted at US and international market.</p> <p>Raise profile of Commandery and Worcester England’s Civil War City to tour operators.</p>
August 2018	<p><b>Project evaluation</b> Analysing qualitative and quantitative data to enable project management team to continuously assess success of</p>	The Commandery Worcester	Marketing & Events Manager, Commandery Manager, Museums	Everyone involved in the project, including HLF and partner organisations	<p>Audience feedback on success of project.</p> <p>Completed project evaluation report.</p>

## Appendix 2 - The Commandery: It Happened Here

When?	What?	Where?	Who will carry out the activity?	Who is the activity for?	What will you achieve?
	<p>project and make necessary adjustments to programme.</p> <p>Project evaluation report completed</p>		Worcestershire		Data to inform future development decisions.
August 2018	<b><i>Project completion</i></b>	The Commandery, Worcester	General Manager and project team	Commandery project team, partner organisations, delivery partners.	<i>The Commandery; It Happened Here</i> project completion reports and evaluation submitted.

**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**MUSEUMS WORCESTERSHIRE SERVICE PLAN 2017-18**

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**Recommendation**

**1. The Museums General Manager recommends that the Joint Committee approves the service plan for 2017-18.**

**Background**

2. The Joint Committee is required to approve an annual service plan under the terms of the partnership agreement.

3. The plan provides a detailed work programme for the forthcoming financial year based on the overall direction and strategic objectives within the strategic plan agreed in November 2014. These are set out below:

- *To create compelling, high quality destinations, exhibitions and events.*
- *To develop heritage marketing and related tourism opportunities in the City and County*
- *To improve health, volunteering and learning opportunities in local communities*
- *To maintain responsible guardianship for our collections*
- *To secure a viable future for our museum sites through new ways of working*

4. Progress reports will be provided to members on a quarterly basis. The plan is also used internally for performance monitoring and where necessary is supported by site, team and personal action plans.

**Contact Points**

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**Supporting Information**

Appendix 1 - Museums Worcestershire service plan 2017-18

## **Background Papers**

In the opinion of the proper officer (in this case the Museums General Manager) there are no background papers relating to the subject matter of this report.

# MUSEUMS WORCESTERSHIRE

## SERVICE PLAN 2017-18

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
A. To create compelling, high quality destinations, exhibitions and events.	1	<p>Curate an exceptional programme of exhibitions at Worcester City Art Gallery, attracting visitors to the city and encouraging participation for local families</p> <p><i>Targets:</i>            26,000 visitors to David Cox            14,000 visitors to Celebrity            12,000 visitors to Warhol to Walker</p> <p><i>Increased visitor engagement compared with 2016 evidenced through evaluation</i></p> <p><i>Programme of partnership activities with British Museum improving skills and visitor offer</i></p>	Collection: <i>Enquiring Minds</i> Destination: <i>David Cox and his Contemporaries</i> Family: <i>Celebrity</i> Local Creative: <i>Society of Artists 70<sup>th</sup> anniversary</i> Challenge: <i>Warhol to Walker</i> Local Creative: <i>Crafted for You</i>	Nov 2017 June 2017 Sept 2017 Oct 2017 Jan 2018 Jan 2018	
	2	Refresh permanent displays at all sites and put 100 objects from the collection newly on display	Museum Gallery 2 Hartlebury transition lobby	Aug 2017 March 2018	

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
	3	In partnership with Worcestershire Archaeology and the Hive, start HLF-funded Ice Age project	2 events at Museum & Art Gallery	Dec 2017	
	4	Commission and install Worcester's Civil War Story display at The Commandery and a city Civil War trail from the site <i>Targets:</i> <i>Increase average visitor on-site dwell time to 1 hour 45 minutes</i> <i>£37K admissions income from July 17 – March 18</i>	Complete and launch phases 1 and 2 of capital project	July 17	
	5	Pilot new programme of adult-focussed events at Art Gallery & Museum to target new audiences <i>Targets:</i> <i>3 new events to deliver 50 visitors each</i>	Implement Blue Sail marketing strategy Commission marketing collateral Launch new displays	April 17 July 17 April 17	

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	

			Event content 3 events delivered	July 17	
<i>B. To develop heritage marketing and related tourism opportunities in the City and County</i>	1	To respond to key drivers and priorities of our funding Councils by working with partners across Worcester to increase the profile of heritage and maximise opportunities to improve the visitor economy in Worcester	To continue to lead on raising the profile of Worcester – The Civil War City	March 18	
	2	Package Destination exhibitions at Art Gallery & Museum to appeal to visitors from outside WR postcodes <i>Target: 40% of visitors to major exhibitions coming from outside WR postcodes</i>	Devise marketing plans for: Celebrity Warhol to Walker BW Leader	April 17 June17 Sept 17	
	3	Package the new Commandery offer as part of a wider heritage offer in the city			

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	

		<i>Target: 60% of admissions from outside City</i>			
C. To improve health, volunteering and learning opportunities in local communities	1	Open Gallery Space at Museum and Art Gallery <i>Yr2 – Target: 4 exhibitions for 17/18</i>	Full launch of community exhibition space at MAG for	March 18	
	2	Redevelop loans service to meet learning and health outcomes <i>Target: New community loans offer to continue dementia friendly work</i>	Create plan and allocate loans funds to 3 year plan for loans redevelopment	Oct 17	
			Appointment of Loans Assistant to deliver redevelopment plan	June 17	
	3	Increase formal learning activities at the Commandery <i>Target: 10% increase</i>	Redevelop schools package using internal and external funds	March 18	
4	Develop formal learning offer at Hartlebury <i>Target: Development 2 new</i>	Redevelop schools package using internal and external funds	March 18		

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
	5	<i>schools sessions</i> <i>Target: 10% increase</i> Increase levels of volunteering at Museums Worcestershire sites and support heritage volunteering across the County	Commission research into current MW volunteering opportunities and skills gaps  Review impact of Worcs. Volunteer Portal	July 17  March 18	
<i>D. To maintain responsible guardianship for our collections</i>	1	City collection documentation backlog	Phase 2 inventories complete and available on website	Dec 2016	
	2	Network and resources for glove collection increased, towards Designation	Map partner collections, academic study and audit collection strengths	Sept 2017	
	3	Increased number of objects in store and their associated information made accessible remotely	50 objects from across the stored collections digitised for access online Near Field Communication tablet-based additional	Jan 2018  Oct 2017	

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
	4	Environmental conditions improved at Commandery, Collections Centre and Hartlebury, enabling the display of more objects	research and interpretation available at The Commandery Installation of Arts Council-funded equipment at Commandery County costume collection inspected for pests and infested items frozen/sprayed	May 2017 Aug 2017	
	5	Archaeology collections and archives scoped for rationalisation, funded by Historic England	Action plan report	Nov 2017	
<i>E. To secure a viable future for our museum sites through new ways of working</i>	1	To continue with the Museums Futures programme to ensure sustainable solutions for all venues through product development and organisational resilience	Devise Audience Development Plan for Art Gallery & Museum Develop new medium term financial plan for museums and report to joint committee	May 17 Nov 17	
	2	Continue to implement			

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
	3	Fundraising strategy <i>Targets:</i> 100 new members to new Membership Scheme	Launch Membership Scheme MAG Launch Membership Scheme Commandery	April 17 June 17	
	3	Develop the Commandery as a venue for Weddings and Civil ceremonies and increase private hires <i>Targets:</i> Year 1 18/19 6 weddings, 2 small hires	New wedding /private hire co-ordinator recruited Launch New Wedding/Events package	September 17 October 17	
	4	Work with Hartlebury Castle Preservation Trust team to develop capital project and activity plans as part of HLF funded scheme	Complete agreements and devise new working arrangements to meet the needs of the project	March 18	
	5	Ensure visitor facilities, hires	Install EPOS systems at MAG	April 18	

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
		and retailing contribute to the visitor offer and venue sustainability <i>Increase retail income from both venues by 10%</i>	and Commandery  Establish new catering provision at the Commandery on basis of a 3 year lease	April 2017	
	6	Implement Mercury Project across all Museums sites	Support all staff on new systems for Finance and HR & put procedures in place for managing those systems in Museums	May 17	
		Share our expertise with partners as part of externally-funded projects and events, returning income to service	Organise Skills sharing workshops, 30 attendees	Oct 2017	
			Lecturing at University of Worcester	Mar 2018	
			Decant Museum of Royal Worcester displays before	Dec 2017	

Strategic Objective	Key Targets/Work Areas		Actions		Progress
	What		What	By when	
		Contribute to regional partnership working for LA museum services to act as strategic leaders	redevelopment  Commission of research through Marches Network for long-term strategic working between West Midlands LA museum services	Dec 2017	

**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**HERITAGE MARKETING**

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**Recommendation**

**1. The Museums General Manager recommends that the progress made in delivering museums and heritage marketing projects be noted.**

**Background**

2. Service marketing has focussed on our individual venues' events and exhibitions programme. 'Destination' exhibitions at the Art Gallery & Museum continue to bring in record visitor numbers with large percentages coming from outside of the WR postcode, resulting in a positive impact on the city's visitor economy. 'This Green Earth' in spring 2016 welcomed 42% of its visitors from outside the city. The Jeremy Deller exhibition exceeded visitor targets by 15%; 49% of visitors were visiting the Art Gallery & Museum for the first time, and 11% of visitors were aged 16 – 24. The current exhibition David Cox and his Contemporaries has already been well received with almost 3,000 visitors in the first two weeks of opening. Through Arts Council England funding we were able to extend marketing to in-train advertising, widening our geographic reach.

3. The annual Living History event at The Commandery continues to be popular seeing a 12% increase in the number of visitors in 2017 and achieving an increase in admissions of 41% up from 2016.

4. Living History is a key part of the Love Worcester Heritage Festival, which has drawn large numbers to heritage events across the city with two events at the Art Gallery & Museum also benefitting from being part of the packaging. Museums Worcestershire supported Love Worcester this year by providing marketing expertise. All venues are reporting a successful week.

5. We continue to build our on-line presence: We have improved the way we are managing Trip Advisor and ensuring we respond to all comments, good and bad. As a result The Commandery has climbed the rankings from #18 to #9 out of 48 things to do in Worcester, and has had a 30% increase in reviews. In response to research findings that Commandery audiences wish to access events information via Facebook we have increased our presence on Facebook, resulting in a much higher reach and engagement:

- Total reach 2015: 90,000
- Total reach 2016: 229,000

6. Nationally, we continue to work with Visit Worcestershire to build the profile of the heritage and cultural offer of the city and county and have contributed advertising to the

official Visit Worcestershire guides. We also supported the recent City Council tourism feature in the GWR 'Escape' magazine.

7. The £136k award from Arts Council England Museum Resilience has funded two major marketing campaigns and the largest programme of visitor research ever carried out by Museums Worcestershire. County Treasures celebrates the County collections and through a county-wide advertising programme links the collections to the new Hartlebury destination. City Treasures has seen the city collections appear on billboard advertising and on the side of buses on ten Worcester routes. Innovative digital screen advertising has also reunited objects from the collection with their place of origin or source of inspiration.

8. Museums Worcestershire is working with the Audience Agency on the programme of research, with surveys being conducted on and off-site. Conclusions will include mapping where visitors are coming from, benchmarking against national and regional data and exploring barriers to non-attendance.

9. The Worcester News continues to be incredibly supportive through their coverage of exhibitions and events and the 'Museum object of the week' which appears each Saturday.

## **Contact Points**

### County Council Contact Points

County Council: 01905 763763

Worcestershire Hub: 01905 765765

### Specific Contact Points for this report

Helen Large, Marketing & Events Manager, Museums Worcestershire

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Email: [HLarge@worcestershire.gov.uk](mailto:HLarge@worcestershire.gov.uk)

## **Background Papers**

In the opinion of the Museums General Manager the following are the background papers relating to the subject matter of this report:

Arts Council Resilience Fund application 2015-17

**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**MEMBERSHIP SCHEME**

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**Recommendation**

- 1. The Museums General Manager recommends that the Joint Committee**
  - a) Authorise the pilot testing of a new membership scheme**

**Background**

2. In September 2016 the Joint Museum Committee authorised the development of a new Membership Scheme as part of a fundraising strategy to seek alternative sources of income, contributing towards a more resilient and viable service, and as a mechanism to build relationships with our loyal visitors and develop new supporters and audiences.
3. A new Membership Scheme was first recommended in a Fundraising strategy produced by Swift consultants, which set out the groundwork for a new focus on sustainable fundraising. The fundraising strategy supports the following Museums Worcestershire strategic priorities:
  - To secure a viable future for our museum sites through new ways of working.
4. The current consultants (funded by Arts Council England Museum Resilience Fund) have created the new scheme following extensive desk research into other membership schemes regionally and nationally, a survey of current visitors, a focus group and 1:1 consultations.
5. Research indicates that there is support for a new Membership Scheme, primarily based on offering a package of exclusive member benefits including some financial rewards. It also indicates that a low to mid-level pricing structure would be most appealing.
6. The Membership Scheme proposal is for:
  - a) A simple flat scheme, with individual or family membership on offer; this will make it easy to market and administer in the initial roll out period.
  - b) Unique membership for each venue, with relevant benefits; this echoes supporters' requests to be affiliated to a specific museum.
  - c) A scheme which is flexible and easy to build on; a premium or even a low-cost layer could be added in the future.
  - d) A scheme that can be administered and tracked through the new CRM system.

- e) A cost of £20 per individual and £40 for a family (up to two adults and three children).
- f) A discounted rate if a membership is purchased for two venues, of £35 for individuals and £70 for family Memberships.
- g) A scheme which offers attractive and tangible benefits: for example if Commandery membership is purchased by a Worcester resident at the same time as an entry ticket to the Commandery, the entry cost is refunded.
- h) A scheme which is cost effective and will generate revenues longer term.
- i) A scheme which will develop current relationships with supporters and generate new ones, encouraging donations and longer term support.

7. A Membership Scheme is a mutual relationship between a venue and a supporter, with benefits on either side. The suggested package of benefits to those purchasing the Membership scheme is:

- a) 10% discount at the Art Gallery & Museum and Commandery shops
- b) Priority booking for some events
- c) Member-only events
- d) Exclusive members section on museums Worcestershire.org.uk
- e) Free tour of Museums Worcestershire Collections Centre
- f) 10% discount on entry to The Commandery
- g) Exclusive members' e-newsletter
- h) A supporter's name in Museums Worcestershire public promotions

8. It is recommended that the Membership Scheme be piloted at the Art Gallery & Museum and subsequently at The Commandery, and reviewed after one year of operation. In future it could be extended to Hartlebury in association with HCPT, or opened up to other partners.

9. It is suggested that Museums Worcestershire income from the Membership Scheme is divided as follows:

- a) 20% to cover costs of benefits provided and further marketing of the Scheme
- b) 40% to the core budget of the venue to which the Member affiliates
- c) 40% towards projects / acquisitions

10. The launch of the new Membership Scheme is funded from the Arts Council England Museum Resilience Fund.

11. The target for first year of operating is 100 new members across two Schemes, with a 20% increase year on year.

## **Contact Points**

### County Council Contact Points

County Council: 01905 763763

Worcestershire Hub: 01905 765765

### Specific Contact Points for this report

Helen Large, Marketing & Events Manager, Museums Worcestershire

Tel: 01905 25371

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## **Background Papers**

In the opinion of the proper officer (in this case the Museums General Manager) the following are the background papers relating to the subject matter of this report:

Arts Council Resilience Fund application 2015-17

Joint Museum Committee minute 266b, Wednesday 9<sup>th</sup> March 2016

Joint Museum Committee minute 284, Wednesday 14<sup>th</sup> September 2016

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**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**PERFORMANCE AND PLANNING 3RD QUARTER 2016-17**

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**Recommendation**

**1. The Museums General Manager recommends that the Joint Committee notes the performance and planning information provided for the 3rd quarter 2016-17.**

**Background**

2. The attached service plan and reports give an account of progress in delivering the work programme against existing service priorities and targets.

3. This report also provides data showing a summary of performance against indicators from the 3rd quarter, pending the introduction of new indicators in 2017-18 to respond to corporate plan changes. Work is also in progress to benchmark with other museums and heritage organisations, in particular the English Civic Museums Network. New targets for museums will be set for next year, in view of the two major capital projects to be launched in 2017-18.

4. Some of the key points to note from the 3<sup>rd</sup> quarter are:

- Overall, attendances are up by 2%, thanks principally to excellent figures from the Museum and Art Gallery which saw its highest attendances for the period since 2012, supported by its targeted exhibitions programme and extra events (16 up from 11 the previous year). The Deller exhibition exceeded the visitor target by 15%, welcoming 11,500 visitors, in a normally quieter period of the year.
- Both the Commandery and Hartlebury are waiting for the impact of extra investment in their offer. The need to plan around these changes and suspend parts of the events programme has depressed visitor numbers on both sites. This is particularly the case at Hartlebury which has relied for much of its appeal on larger scale events in the past.
- The numbers of visits by children and young people has begun to stabilise and new plans for formal learning are being developed, to encourage schools to make maximum use of the new displays and activities when they open.
- Retail spend per head showed an increase at the Commandery and Museum and Art Gallery. The Commandery increase of £0.80 per head is the result of extra investment in merchandising and stock displays. The Museum shop turnover was up by 11% in November and the Commandery Christmas event saw retail sales up by 59%.

## **Contact Points**

Worcestershire County Council: 01905 763763  
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### Specific Contact Points for this report

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## **Supporting Information**

- Appendix 1 - 2016-17 Performance summary report
- Appendix 2 - 2016-17 Service plan

## **Background Papers**

In the opinion of the proper officer (in this case the Museums General Manager) there are no background papers relating to the subject matter of this report.

# Museums Worcestershire Performance Indicators - Users

2016/2017 figures as at 31st January 2017

PI	Description	Quarter 1		Quarter 2		Quarter 3		Quarter 4		Cumulative Totals	
		Apr-Jun 2015	Apr-Jun 2016	Jul-Sep 2015	Jul-Sep 2016	Oct-Dec 2015	Oct-Dec 2016	Jan-Mar 2016	Jan-Mar 2017	2015/2016	2016/2017
<b>1</b>	<b>Number of visits in person</b>	23,712	22,493	30,541	30,545	19,956	20,391	21,987	4,719	96,196	78,148
a	City Museum and Art Gallery	14,907	13,950	18,428	18,708	12,345	13,363	14,204	4,168	59,884	50,189
b	The Commandery	3,666	4,054	6,123	6,340	3,391	3,154	3,871	0	17,051	13,548
c	County Museum, Hartlebury	5,139	4,489	5,990	5,497	4,220	3,874	3,912	551	19,261	14,411
<b>2</b>	<b>Website Usage</b>										
a	Number of virtual visits via website (page views)	63,006	42,096	59,351	52,644	54,186	42,921	36,495	16,126	213,037	153,787
b	Sessions generated by first-time visitors to website	--	8,949	--	11,936	--	10,007	--	3,290	--	34,182
<b>3</b>	<b>Organised events and exhibitions</b>	67	29	71	58	32	37	30	5	200	129
a	City Museum and Art Gallery	17	15	13	14	11	16	13	4	54	49
b	The Commandery	30	7	22	23	6	13	8	0	66	43
c	County Museum, Hartlebury	20	7	36	21	15	8	9	1	80	37
<b>4</b>	<b>Number of visits by children/young people</b>	2,383	2,270	2,597	2,189	2,905	2,877	2,433	276	10,318	7,612

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# Museums Worcestershire Performance Indicators - Finance & Quality

2016/2017 figures as at 31st December 2016

PI	Description	Quarter 1		Quarter 2		Quarter 3		Quarter 4		Cumulative Totals	
		Apr-Jun 2015	Apr-Jun 2016	Jul-Sep 2015	Jul-Sep 2016	Oct-Dec 2015	Oct-Dec 2016	Jan-Mar 2016	Jan-Mar 2017	2015/2016	2016/2017
<b>1</b>	<b>Retail spend per head (based on turnover from retail outlets)</b>										
a	City Museum and Art Gallery	£0.45	£0.69	£0.40	£0.06	£0.63	£0.64	£0.53		£0.48	£0.42
b	The Commandery	£0.63	£0.73	£0.40	£0.42	£0.67	£0.80	£0.69		£0.53	£0.60
c	County Museum, Hartlebury	£0.67	£1.07	£1.02	£0.66	£0.97	£0.89	£0.69		£0.89	£0.86
<b>2</b>	<b>Cost per visit or usage (net expenditure divided by physical visits or usages total)</b>										
a	City Museum and Art Gallery	£5.43	£4.06	£3.44	£4.64	£5.06	£5.18	£4.44		£4.53	£4.62
b	The Commandery	£17.28	£13.28	£8.48	£9.84	£15.85	£17.70	£12.28		£12.83	£12.70
c	County Museum, Hartlebury	£7.47	£7.90	£6.89	£8.53	£11.06	£10.73	£11.78		£8.23	£8.94
<b>3</b>	<b>Level of earned income as percentage of subsidy</b>										
a	City Museum and Art Gallery	20.11%	33.45%	22.12%	11.18%	22.16%	20.92%	29.67%		16.10%	16.39%
b	The Commandery	40.62%	45.63%	58.34%	63.45%	39.42%	40.10%	54.10%		34.59%	37.90%
c	County Museum, Hartlebury	29.34%	36.17%	40.87%	39.27%	17.25%	19.82%	34.00%		21.87%	23.81%
<b>4</b>	<b>Museums Libraries and Archives Council's Accreditation Scheme</b>										
a	City Museum and Art Gallery	✓	✓	✓	✓	✓		✓		✓	
b	The Commandery	✓	✓	✓	✓	✓		✓		✓	
c	County Museum, Hartlebury	✓	✓	✓	✓	✓		✓		✓	
<b>5</b>	<b>Direction of travel in respect of West Midlands Regional Museum Council's Fast Forward benchmarking scheme</b>										
a	City Museum and Art Gallery	4.00	4.00	4.00	4.00	4.00		4.00		4.00	
b	The Commandery	3.90	3.90	3.90	3.90	3.90		3.90		3.90	
c	County Museum, Hartlebury	4.60	4.60	4.60	4.60	4.60		4.60		4.60	
<b>6</b>	<b>Heart of England Tourist Board Quality Assurance scheme</b>										
a	City Museum and Art Gallery	✓	✓	✓	✓	✓		✓		✓	
b	The Commandery	✓	✓	✓	✓	✓		✓		✓	
c	County Museum, Hartlebury	✓	✓	✓	✓	✓		✓		✓	

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# MUSEUMS WORCESTERSHIRE

## SERVICE PLAN 2016-17

### 3rd quarter progress

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
To create compelling, high quality destinations, exhibitions and events.	Curate an exceptional programme of exhibitions at Worcester City Art Gallery, attracting visitors to the city and encouraging participation for local families  <i>Targets:</i> 30% of visitors to spring exhibition coming from outside the city 10,000 visitors to summer exhibition Significant loans brought in from 3 major museums 50 local artists worked with	Destination: <i>This Green Earth</i> Family: <i>Pirates, Pants and Wellyphants</i> Challenge: <i>Jeremy Deller</i>  Collection: <i>Divided Loyalties</i>  Local creative: <i>Society of Artists</i> Local creative: <i>Crafted for You</i>	June 2016 Sept 2016  Oct 2016  Nov 2016  Jan 2017 Jan 2017	<i>Jeremy Deller: the Battle of Orgreave</i> on loan from Tate Sept-Nov  88% visitors came specifically to see the exhibition, with main visitor motivations to learn something and be intellectually stimulated.  58% visitors from WR postcodes, and particularly brought visitors from across the Midlands and South East to Worcester, 3% from abroad. 49% were first time visitors to the gallery.  Visitor dwell time averaged 1 hour.  Visitor voluntary donations doubled from autumn slot in 2015.
	Objects for new Hartlebury Castle displays identified	Exhibition designs complete Loan paperwork to HCPT complete	March 2017	Exhibition design work progresses. Discussions with HCPT on the

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
				loan of objects currently displayed in café. Options for objects for lobby area under discussion.
	Commission and install a new Civil War section and research room at The Commandery and a city Civil War trail from the site <i>Target:</i> <i>45 minute visitor dwell time</i>	Designer appointed Trail designed Research room open Installation tender commissioned	April 2016 Sept 2016 Sept 2016 Dec 2016	Additional funding from Heritage Lottery Fund secured. Design for Civil War section complete and in process of procurement.
	First series of behind-the-scenes workshops undertaken <i>Target:</i> <i>30 paying attendees</i>	Collections Centre meeting room set up 2017 programme of day schools and enquiries events	May 2016 Dec 2016	22 paying attendees for skills sharing workshops and 18 for basement tour workshops. Shared expertise and hands-on work welcomed by smaller regional museums.  2017 programme extended to cover other subject skills; publicised and booking being taken.
To develop heritage	To respond to key drivers and	Real-time and static heritage	July 2016	Research and writing for info

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
marketing and related tourism opportunities in the City and County	priorities of our funding Councils by working with partners across Worcester to increase the profile of heritage and maximise opportunities to improve the visitor economy in Worcester	information points Work with Worcester Cathedral to provide reciprocal guides and create a group tour package	March 2017	points completed Real-time information points now carrying MW exhibitions information Static heritage information points no longer going ahead, another partner withdrew funding making project unviable
	To continue to lead on raising the profile of Worcester – The Civil War City	Review and report actions to stakeholders present at Civic presentation in April 2014  Embed in Commandery relaunch marketing strategy	May 2016  March 2017	Stakeholder newsletter distributed November 2016 Stakeholders invited to tour of new display spaces December 2016
	Increase the reach of our venues through joint marketing initiatives <i>30% of visitors to spring exhibition coming from outside the city</i>	Promote This Green Earth to Ashmolean Museum visitors Attendance at tourism exhibitions with Worcester Heritage Partnership and Visit Worcestershire	June 2016  March 2017	Exhibition included in Ashmolean e-newsletter and sent to their 25,000+ enews subscribers

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
	Support Museum of Royal Worcester with their Heritage Lottery Funded improvements	Undertake research for new gallery designs Oversee installation of new china store	June 2016 Dec 2016	New china store installed and collection safely moved. Considerable increased storage capacity achieved.
To improve health, volunteering and learning opportunities in local communities	Skills development programme	Work with Skills for the Future steering group to develop skills development programme research for future trainee/apprenticeship opportunities	Dec 2016	Project Enquiry Form submitted to HLF for next round of funding – First round application deadline October 13 <sup>th</sup> 2016  UPDATE – full submission cancelled due to capacity and resources. Research into similar programmes has started.
	Improve out of term educational offer for the Commandery and Hartlebury  Develop curriculum based learning offer at Commandery and	Improve quality and uptake of out of term activities and attract new visitor groups for the Commandery Develop 'back pack' offer for Commandery family visitors  Trial new schools sessions with pilot schools at Commandery for full new offer	April 2017  April 2017  April 2017	Backpack activities produced and currently in pilot stage. To be reviewed and expanded if successful.  Half term activities modified to improve quality and uptake. Review required in order to assess areas of improvement.

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
	Hartlebury			Team of new casual Interpretation Assistants recruited at Hartlebury to develop and deliver new programmes
	Community loans development	Successful fundraising for county wide care home project following on from evaluation	March 2017	Fundraising element complete – successful funding bids to ACE and Elmley Foundation. Project to be completed by end of March 2017
	Access development for groups	Develop and trial 'Autism Friendly Openings' at MAG and develop resources	Aug 2016	Delayed until Jan 2017 due to Open Gallery project at MAG
	Work with GRT community to develop new project at Hartlebury	Work with Stourport High School to develop new project with GRT community, with new project, exhibition or event as final product.	Oct 2016	Still awaiting response from school – will push to continue discussions during Autumn term
	Widen volunteer and work experience offer	Work with HCPT to merge with Hartlebury volunteers	April 2017	Planning work is in progress. HCPT Volunteer Coordinator will take this forward once recruited (February 2017).

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
		Test new recruitment methods through colleges and WCC work experience database  Trial new county volunteer pass scheme with <i>Learning Worcs</i> group	Oct 2016  April 2017	Research into this has commenced – developing plan to do wider research policy for volunteers for MW and identify gaps
To maintain responsible guardianship for our collections	City collection documentation backlog	Phase 1 inventories complete and available publicly on website	Dec 2016	Complete 11 collection inventories now available online
	Collection highlights digitised	100 objects from across the stored collections digitised for access online	Dec 2016	150 objects digitised and accessible with interpretation online. 85 (to end Dec) published in Worcester News weekly article.
	Insurance and heritage assets review: Phase 1 collections re-valuation	Oil paintings, city collection  Transport, county collection	Jan 2017  March 2017	Oil paintings re-valuation complete

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
	County collection move of social history from SHIC store to collections centre complete	All collection integrated into shelving layout and accessible	May 2016	Complete
	New space for archaeology deposits created	New shelving installed Archive from Hive site excavations deposited	June 2016 March 2017	Complete
To secure a viable future for our museum sites through new ways of working	To continue with the Museums Futures programme to ensure sustainable solutions for all venues through product development and organisational resilience <i>Target: £50,000 from unrestricted giving</i>	Develop first stage of 10 year horizon development plan for museum properties  Active sustainable fundraising programme CRM system fully functioning supporting marketing and fundraising strategies  Programme of audience research across city sites	January 2017  October 2016  December 2016  March 2017	Brief prepared for potential HLF bid. Funding still required to deliver plan.  Programme in place and some successes so far. Membership scheme being formulated  Complete  Audience Finder programme in place and surveys taking place across all venues First reports received
	New hosting arrangements for	Work with the steering group	March	Project deferred by Joint

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
	Museums Worcestershire at Worcester City Council	for shared service hosting to implement plans	2017	Committee until September 2017
	Develop new working methods at Hartlebury as part of next phase of development	To work with Hartlebury Castle Preservation Trust to provide interim solutions for catering and events at Hartlebury	July 2016	New Café operator has been operational since May 2016. New Café building on track to be ready Summer 2017. An integrated annual programme of HCPT and County Museum events is now being delivered. Our first jointly delivered event, Heritage Open Days weekend, was very successful (636 visitors). HCPT have appointed Activities Officer to work with Museum staff to deliver on-site programme of activities.
	Develop audience reach by focussing marketing resources on product development at Hartlebury and The Commandery, and headline exhibitions at the Art Gallery & Museum <i>Target: 20% year-on-year increase in</i>	Implement Blue Sail marketing strategy at Hartlebury  Rebrand and relaunch of Commandery	March 2017	Branding exercise underway Website review taken place  New brand created

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
	<i>visitors to the Commandery</i> <i>Visitor target for This Green Earth: 19,000</i> <i>Visitor target for Pirates, Pants and Wellyphants: 13,000</i> <i>Visitor target for Crafted for You with Society of Artists: 10,000</i>	Segmenting and targeting of exhibitions programme at Art Gallery & Museum to increase audience reach		This Green Earth 25,000 visits  Pirates, Pants and Wellyphants 13,500 visits
	Increase attendance to Commandery Events by 10%	Commandery Events Team, working with external partners to develop and undertake.  Tie in with Citywide and National projects and Heritage City developments	February 2017	30% increase in visitors for August Bank Holiday Battle HQ event  Presence at Worcester Foodie Festival
	Increase uptake of Commandery Learning by 10%	Update and revise Commandery Learning offer and target new school audiences.	Dec 2017	
	Raise the academic profile of the Commandery	Talks and Tours Programme in partnership with external collaborators.  New library opened	April 2017	Third successive run of talks continue to attract an academic audience.  Library books and furniture

Strategic Objective	Key Targets/Work Areas	Actions		Progress
	What	What	By when	
				installed. Library near completion.
	<p>Ensure visitor facilities, hires and retailing contribute to the visitor offer and venue sustainability</p> <p><i>Increase income from all sources by 12%</i></p>	<p>Install EPOS systems across City venues</p> <p>Support with improved systems, exhibitions and customer service training.</p> <p>Refresh and restock Commandery shop, linking with Events and new offer</p>	<p>April 2017</p> <p>April 2017</p> <p>July 2016</p>	<p>Deferred to April 2018 due to possible changes to Museum hosting and difficulties with IT support</p> <p>Stock refreshed, new display furniture sourced, increase of 15.7% April – July 2016</p> <p>On target for increase on year</p>
	<p>Develop the Commandery as a venue for Weddings and Civil ceremonies and increase private hires</p> <p><i>Target: 5 weddings in year 1 rising to 20 by year 3</i></p>	<p>Recruit Wedding/Events organiser</p> <p>Complete Wedding Package for Marketing</p> <p>Launch New Wedding/Events package</p>	<p>July 2016</p> <p>Sept 2016</p> <p>May 2017</p>	<p>Internal experience utilised. Action plan in place.</p> <p>Due to Commandery project delays the wedding and hire package delayed. New launch date October 2017.</p>

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**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**FINANCE REPORT**

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**Recommendation**

1. The Treasurer recommends that the financial position of the Joint Museums Service as detailed in the report be noted.

**Background**

2. This report provides financial information on the following:
  - a) Projection as at 31<sup>st</sup> January 2017
  - b) Subjective analysis
  - c) Explanation of major variances
  - d) Surplus/deficit split
  - e) Draft budget 2017-18

**(a) Table 1 : 2016/17 Projected Outturn as at 30<sup>th</sup> September 2016**

	2016/17 Budget	Projected 2016/17	Variance	Variance %
	£'000	£'000	£'000	%
Hartlebury Operations	207	213	6	3%
Joint Museums Collections Team	141	130	-11	-8%
Worcester City Museum & Art Gallery	179	170	-9	-5%
Commandery	105	115	10	9%
Grants	-	-	-	
Joint Museums Management Team	250	241	-9	-4%
<b>Total Joint Museum Service</b>	<b>882</b>	<b>869</b>	<b>-13</b>	<b>-1%</b>

**(b) Table 2 : Subjective Analysis 2016/17**

	Budget	Projection	Variance	%
	£000	£000	£000	
<b>Employees</b>	836	845	9	1%
<b>Premises</b>	8	9	1	17%
<b>Transport</b>	11	9	-2	-22%
<b>Supplies &amp; services</b>	150	171	21	14%
<b>Transfer to reserve</b>	0	0	0	
<b>Income - Sales</b>	-62	-58	4	-6%
<b>Income - Admissions</b>	-34	-52	-18	53%
<b>Income - Other</b>	-27	-55	-28	99%
<b>Transfer from reserve</b>	0	0	0	
<b>Total</b>	<b>882</b>	<b>869</b>	<b>-13</b>	<b>-1%</b>

### (c) Explanation of major variances

3. The salary variance, in the main, is due to the retention of a Property Manager at Hartlebury working on the transfer. This is offset by the admissions income.
4. There is no supplies & services budget for publications and stock at Hartlebury but this is offset by additional income variance.
5. Although Hartlebury has extra salaries and supplies, the income generates a net surplus of £6k deficit. Therefore, the current underspend of £13k, is actually from smaller salary underspends in Collections, Museum & Art Gallery and the Management Team.

### (d) Surplus/deficit split

6. Under the terms of the agreement, as the variance to budget is within 5%, any monies will be transferred to the Joint Museum Reserve (value at 31.03.16 = £43,459.61).

### (e) Draft Budget 2017-18

7. There has been a £1,725 increase since the November report due to employee inflation. The changes year on year are for inflation on Pay and Insurances and include an income target for Hartlebury (removed in 2015-16).

	2016/17	2017-18	Change
Employees	£836,264	£853,490	£17,226
Premises	£8,200	£8,200	£0
Transport	£11,090	£11,470	£380
Supplies & Services	£150,049	£151,630	£1,581
Sales Income	-£61,900	-£61,900	£0
Admissions Income	-£34,400	-£78,400	-£44,000
Other Income	-£27,000	-£27,000	£0
<b>Total</b>	<b>£882,303</b>	<b>£857,490</b>	<b>-£24,813</b>
Worcester City Contribution	£486,040	£493,030	£6,990
Worcester County Liability	£396,263	£364,460	-£31,803

8. There is a recharge from the County to the City of £10,580, for the hosting of the service.

### Contact Points

#### County Council Contact Points

County Council: 01905 763763

Worcestershire Hub: 01905 765765

#### Specific Contact Points for this report

Caroline Brand, CFC Finance Manager

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## **Background Papers**

In the opinion of the proper officer (in this case the Head of Community Services) there are no background papers relating to the subject matter of this report.

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**JOINT MUSEUMS COMMITTEE  
15 MARCH 2017**

**WORK PROGRAMME**

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**Recommendation**

- 1. The Joint Committee is asked to note its future work programme and consider whether there are any matters it would wish to be incorporated.**

**Background**

2. In order to allow the Joint Committee to manage its future work programme, a list of anticipated items has been set out below:

**21 June 2017 at 2.00pm at the Commandery**

Annual Review  
Hazardous Collections Report  
Strategic Plan Review  
Performance and Planning Report – 4th quarter  
Finance – 4th quarter monitoring report

**September 2017**

Museum Hosting  
Hartlebury progress report  
Museum and Art Gallery Development Plan  
Performance and Planning Report – 1st quarter  
Finance – 1st quarter monitoring report

**November 2017**

Commandery Development – phase 3  
Financial Planning Report  
Performance and Planning Report – 2nd quarter  
Finance – 2nd quarter monitoring report

**March 2018**

Service Plan 2018-19  
Performance and Planning Report – 3rd quarter  
Finance – 3rd quarter monitoring report

3. The Joint Committee should consider whether there are any matters it would wish to be incorporated into the above programme.

## **Contact Points**

### County Council Contact Points

County Council: 01905 763763

Worcestershire Hub: 01905 765765

### Specific Contact Points for this report

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## **Background Papers**

In the opinion of the proper officer (in this case the Head of Legal and Democratic Services) there are no background papers relating to the subject matter of this report.