



Bewdley Museum

Options Appraisal

July 2020



people spaces places

Bewdley Museum

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March 2020

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Appendix C – Performance framework model

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1 Context

1 Context

Key drivers for change

1.1 Council financial savings

One of the key drivers for implementing this options appraisal is the challenge for the council to continuously improve public services with limited resources. This options appraisal was initiated to investigate the opportunities for Bewdley Museum to use trust status as a future business model as well as considering other alternatives. Any preferred option will need to be more fully tested through a feasibility stage.

To date the council has outsourced its leisure centre provision, transferred Kidderminster Town Hall to the Town Council and is transferring its events programme to the voluntary sector.

During the future feasibility stage the best governance option for securing an effective museum service will need to be explored. There will need to be an assessment of the existing legal status of the service, its collections and its properties, and also a broad look at organisational and business implications. Key questions for this phase of the process should include;

- Does the principal of developing/establishing a Trust for the museum service make sense?
- Is it viable?
- Are there legal, financial or operational obstacles?
- Bewdley Museum is currently a registered charity and there are a number of areas and buildings on the site that are already held in trust - can this existing trust be developed?

This stage should also explore what might make a transfer impossible at this time. This could be a legal issue, a political one, a timing one, a capacity one, or it could be that disentangling from the local authority's central services is perceived to be too difficult.

One of the key aims for moving into Trust status should be the intention to develop the service and improve its quality of delivery. The move should primarily be one of organisational development, such as the continuous improvement of services for public benefit, that can be delivered in the most efficient, effective and economic way.

1.2 Museum business plan

The current business plan was written in 2016, operational and financial planning takes place on an annual basis and is reviewed on a regular basis at team meetings at the quarterly management committee meetings.

The current museum business plan expires in 2020 and recently any Museum Manager time available was diverted to supporting this options appraisal work and subsequently to responding to Covid 19.



2 Scope

The Museum was acquired in the 1970s and has gradually grown in its physical extent through a series of additions including the Tourist Information Centre and the Guildhall. It is 10 years since the last significant investment which was grant aided by the Heritage Lottery Fund. Designations relating to the buildings are set out at section 3.2 below.

As highlighted earlier there are various components to the existing museum and these can be viewed as:

- the buildings and museum gardens themselves (i.e. the physical assets),
- the collection (which is partly on display and partly in store),
- the museum store itself (although this is not owned by WFDC),
- the Museum Service (i.e. the staff and resources)
- the Queen Elizabeth II Jubilee Gardens (currently managed by Parks).
- the Guildhall and Mayor's parlour

It is a complex mix of assets and services, each of which has restrictions or issues relating to it.

There is also the existing Bewdley Museum Charitable Trust to factor into the equation.

2.1 The Bewdley Museum Charitable Trust

The trust was formed in 1965 and the charitable objects stated on the Charity Commission web site are:

The establishment maintenance and promotion of a public museum for the exhibition of items of local or historical interest or value.

The council is the sole Trustee but there are no Trustee / Board meetings. As the Council funds the Museum, all income goes through WFDC accounts so the charity commission returns show zero income or expenditure.

As will be highlighted under legal issues below, part of the site is registered freehold for the trust and part was leased to the Trust.

Many grants are only available to Charitable trusts, in these cases applications are currently made through the Friends of Bewdley Museum and the funds then transferred to WFDC.

2.2 Queen Elizabeth II Jubilee Gardens

These gardens total around 1.2ha in size and could form an excellent complement to the Museum. They are generally well kept and have achieved the Green Flag Award for at least the last 8 years. They are managed by the Parks Service and have a 10-year management plan in place (last updated February 2020).

2.3 Museum Store

Some of the Museum collection is kept off site at a rented unit in Rushock. The district council also stores around 500 of its archive boxes here and Kidderminster Town Council make an annual contribution towards costs for their elements of the collection.

Details of the lease are set out at 3.1 below.



3 Constraints

3 Constraints

There are a number of areas that need to be worked through before any transfer could occur

3.1 Legal issues

Ownership

The museum is wholly owned by Wyre Forest District Council with areas of the site held in trust. All areas of the site would be considered for transfer into the trust to include The Guildhall and Queen Elizabeth II Jubilee Gardens.

WFDC have ownership of the collection, it is imperative that collections are safeguarded in perpetuity. If legal title to the collections is transferred to the Trust then the collections will be in the ownership of the Trust. The significance of this is that if the Trust got into financial difficulties, then the collection would be treated as an asset of the Trust and could potentially be seized to settle outstanding debts and other liabilities. WFDC could retain the title to the collections and where the collections are loaned to the local authority by a third party the authority would remain as 'custodian trustee'

The Trust would be responsible for the management of the collections and WFDC would set out its expectations in a 'Loan Agreement' which parties would enter into.

The Gardens are entirely within WFDC ownership and are believed to be free of covenants but may have agreements relating to boundary walls.

Leases

The Guildhall has an arrangement with Bewdley Town Council for use of the small meeting room off the Guildhall which generates £600 per year. It is not clear what legal form this takes but it appears to be a lease between WFDC and the Town Council linked to a responsibility of the district to provide space.

There is an agreement between WFDC and Kidderminster Town Council for use of the Museum Store which generates £3000 per year. The lease includes break clauses to allow for moving the store if required. The Museum Store is leased by WFDC from a private owner. The current lease is due to expire in the 2022/23 financial year.

Covenants

There are not thought to be any covenants applying to the Museum, Guildhall or Gardens.

3.2 Designations / accreditations

The Museum site contains four listed buildings:

- Town Hall Grade II* <https://historicengland.org.uk/listing/the-list/list-entry/1100788>
- 12 Load Street Grade II <https://historicengland.org.uk/listing/the-list/list-entry/1167146>
- The Shambles and Old Prison Cells Grade II <https://historicengland.org.uk/listing/the-list/list-entry/1348276>
- Brass Foundry <https://historicengland.org.uk/listing/the-list/list-entry/1348275>

The Museum has Accredited Museum Status which is applied for every 5 years and is next due to be applied for in summer 2021.

The Gardens currently hold Green Flag Award which is an annual application process which closes in January each year. The current management plan (2020 to 2030) would be updated annually and then revised in years 5 and 10.

3.3 The Current Trust

As referred to above there is a current charitable trust of which the council act as sole Trustee.

Consideration should be given to whether this Trust could become the future organisation that would retain the freehold of the Museum and take responsibility for the Gardens, the ownership of the collection, the employment of staff and also whether it could handle the commercial operations of the museum.

3.4 Governance and partnerships

3.4.1 The Bewdley Museum Management Group

The Management Committee Group was established in February 2008. The group meets quarterly and is made up of The Friends of Bewdley Museum, Town, District and County Councillors, the Guild of St George and the Bewdley Development Trust.

As part of the development of this report, the meeting of the group on 3rd March 2020 was attended by Council officers and the lead consultant working on this report. A verbal presentation made about the achievements of the museum, the key drivers for change and a possible road map for the future. The group were extremely supportive of the Museum's future and saw it as an integral part of the town and wider district.

3.4.2 The Friends of Bewdley Museum

The Friends Group have registered a Charitable Trust and a CIO (April 2018) and have supported the Museum for many years. As with the management group above (of which they are part), the Friends Group is a key stakeholder in the future of the museum and could play an important role should the museum transfer to a Trust.



4 How Did We Get Here? (The Last 5 years)

4 How Did We Get Here? (The Last 5 years)

4.1 Visitors, audiences and volunteers

The museum team have been gathering information about visitors and volunteers for some years. As part of this piece of work CFP have gathered information and drafted what could be a framework to be developed in the future. This is shown at appendix C.

4.1.1 Visitor surveys

The largest face to face visitor survey was carried out (n=378) in 2015 by the Audience Agency and this presented useful data about the current audience at that time.

- 59% of visitors had visited in the past 12 months
- 28% were first time visitors
- The average number of visits in the past 12 months was 15 showing huge repeat visits
- Word of mouth was the most popular source of information, social media at that time had virtually no impact
- The impact of cultural tourism was not measured but it was shown that 65% of visitors went shopping in Bewdley, 57% visited cafes, 30% visited pubs
- Survey respondents were typically female (69%), over 55 (61%), white (99%)

The survey could be expanded in the future to better understand the contribution that the Museum makes to the economy of Bewdley, to look at other attractions visited, dwell time, method of travel, areas of the Museum visited etc.

Additional mapping analysis carried out by CFP is set out in appendix B of this report this shows that 31% of visitors come from the Wyre Forest District, 53% were day trippers and around 16% tourists.

This information has been used by CFP to input into the system used by Museums Worcestershire to measure economic impact (see appendix D).

4.1.2 Visitor numbers

The Museum has a number of automated people counters that record everyone that passes them. These have been in place for a number of years and recent data is shown below in Table 1. N.B. data is gathered March to February each year, so the 2019/20 figures are actual.

Year	Annual Visits	% increase
2010/11	134,917	n/a
2011/12	142,526	5.6
2012/13	144,348	1.3
2013/14	145,742	1.0
2014/15	168,479	15.6
2015/16	174,221	3.4
2016/17	190,413	9.3
2017/18	191,331	0.5
2018/19	204,186	6.7
2019/20	246,470	20.7

Table 1 Visitor numbers by year

Graphically this can be represented as follows:

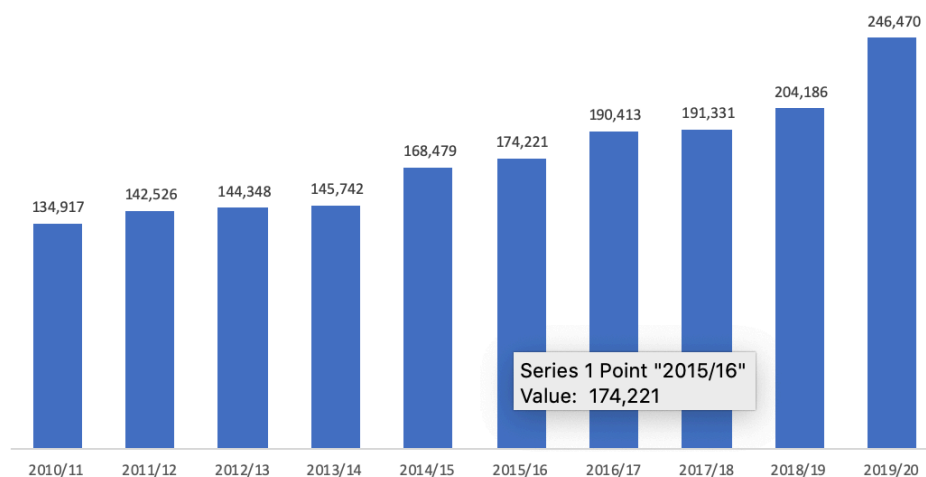


Chart 1 Visitor numbers

4.1.3 Schools

Since 2017 the Museum has played host to visits from 66 schools the geographical distribution of which is shown in **Figure 1** on the following page. As shown in **Table 2** below, over two fifths (43.2%) of schools returning at least twice (**Table 2**).

	N	%
Once	37	56.1
Twice	25	37.9
Three times	4	6.1
TOTAL	66	100.0

Table 2 School visits

4.1.4 Volunteers

Volunteers are managed by a part time volunteer coordinator who works 1 day per week. Volunteer hours are recorded and these are analysed below.

Year	Volunteer Hours
2019	1723 (excluding Nov and Dec)
2018	2318
2017	1964
2016	1537

Table 3 Volunteer hours 2016-2019

Even using the basic £50 per volunteer day unskilled rate provided by National Lottery Heritage Fund then this equates to the following in kind contributions.

Year	In kind
2019	tbc
2018	16,557
2017	14,028
2016	10,978

Table 4 Volunteer in kind 2016-2019

This is likely to be an underestimate as many volunteer tasks would be classed as skilled and so would attract a higher day rate of £150 per day. Unfortunately, no information was available on the nature of work undertaken by volunteers to allow a more detailed calculation to take place.

Bewdley Museum

Figure 1
School Locations

LEGEND

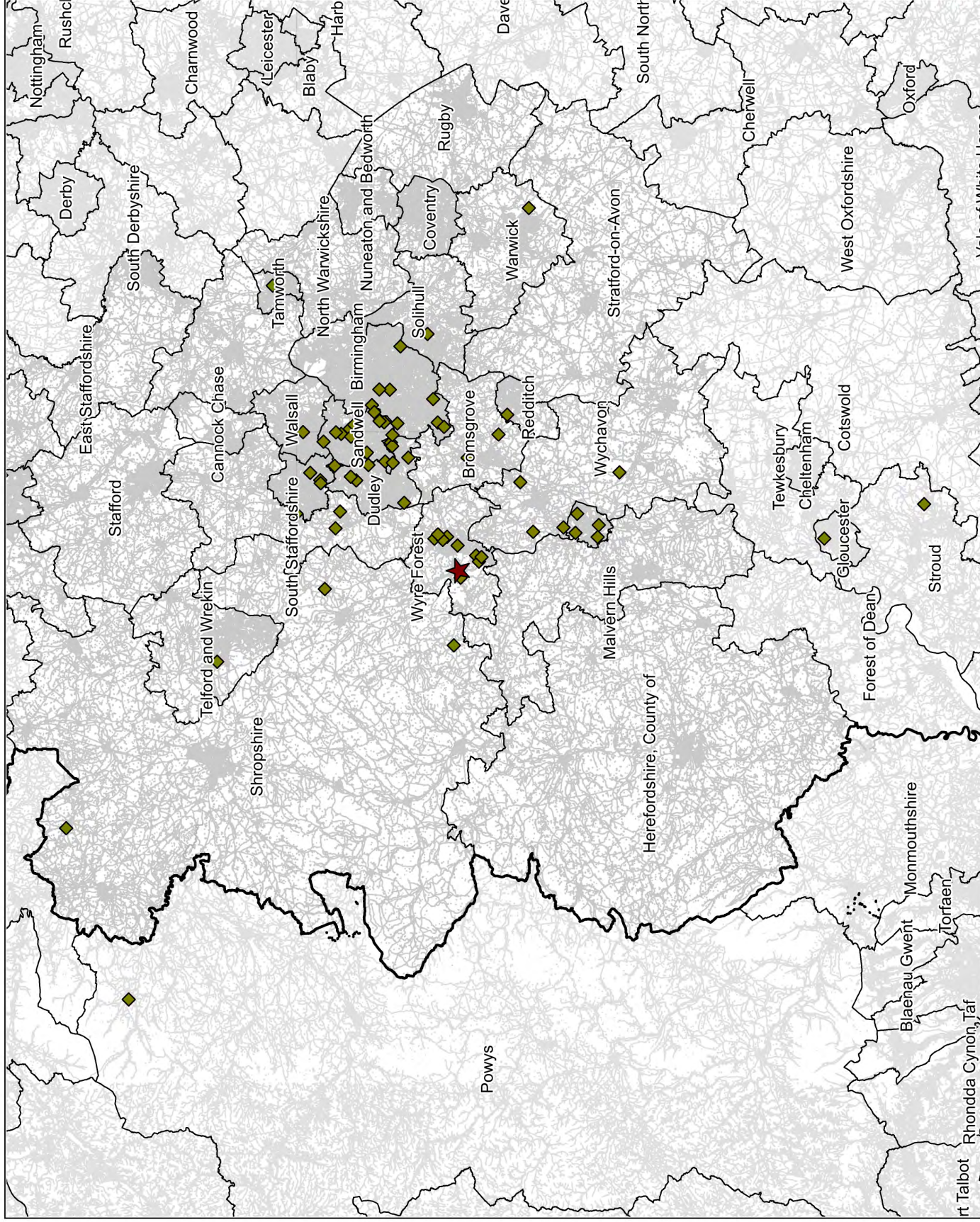
Schools Location

Museum Location

Local Authority
Boundary

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4.2 Finances

Table 5 below shows a summary on income generated over recent years.

	13/14	14/15	15/16	16/17	17/18	18/19	19/20 To Date* (Jan20)
Education	9,181	14,233	11,036	18,132	23,059	33,033	24,019
Events and Activities	3,050	11,595	15,645	13,799	23,391	22,519	22,391
Shop	15,000	17,130	14,650	45,146	54,468	51,400	48,738
Craft Studios	9,720	11,804	13,334	14,464	14,995	15,452	11,400
Cafe	4,788	8,690	10,734	10,868	11,538	13,190	11,832
Weddings	-	-	-	-	6,806	2,229	13,337
TOTAL	41,739	63,452	65,399	102,409	134,257	137,823	131,717

Table 5 Income generated

This can be shown graphically as follows:

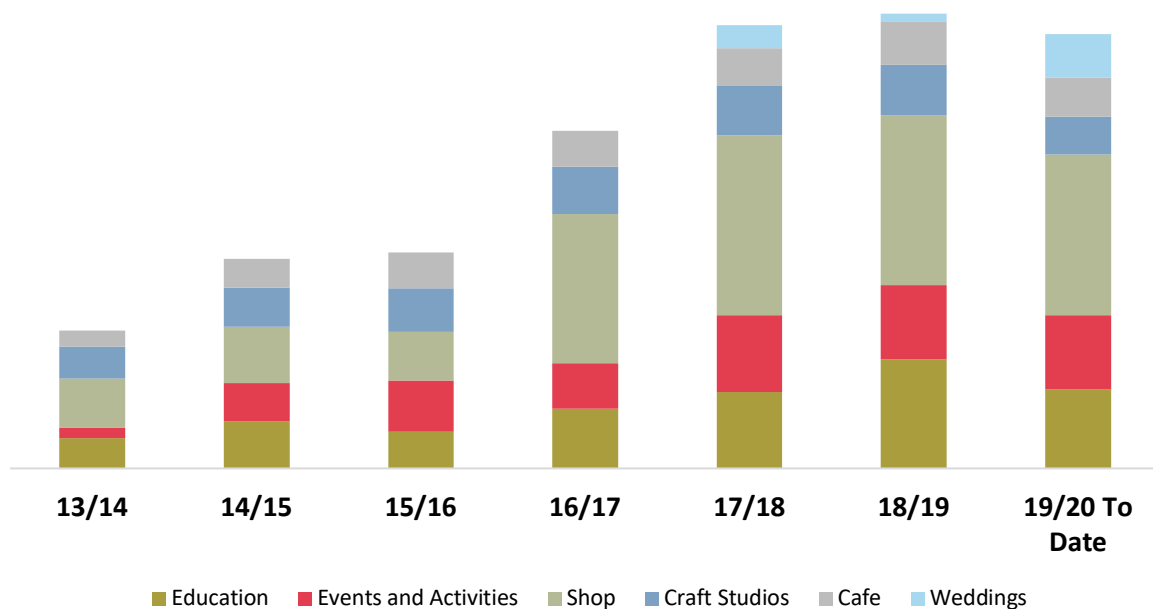
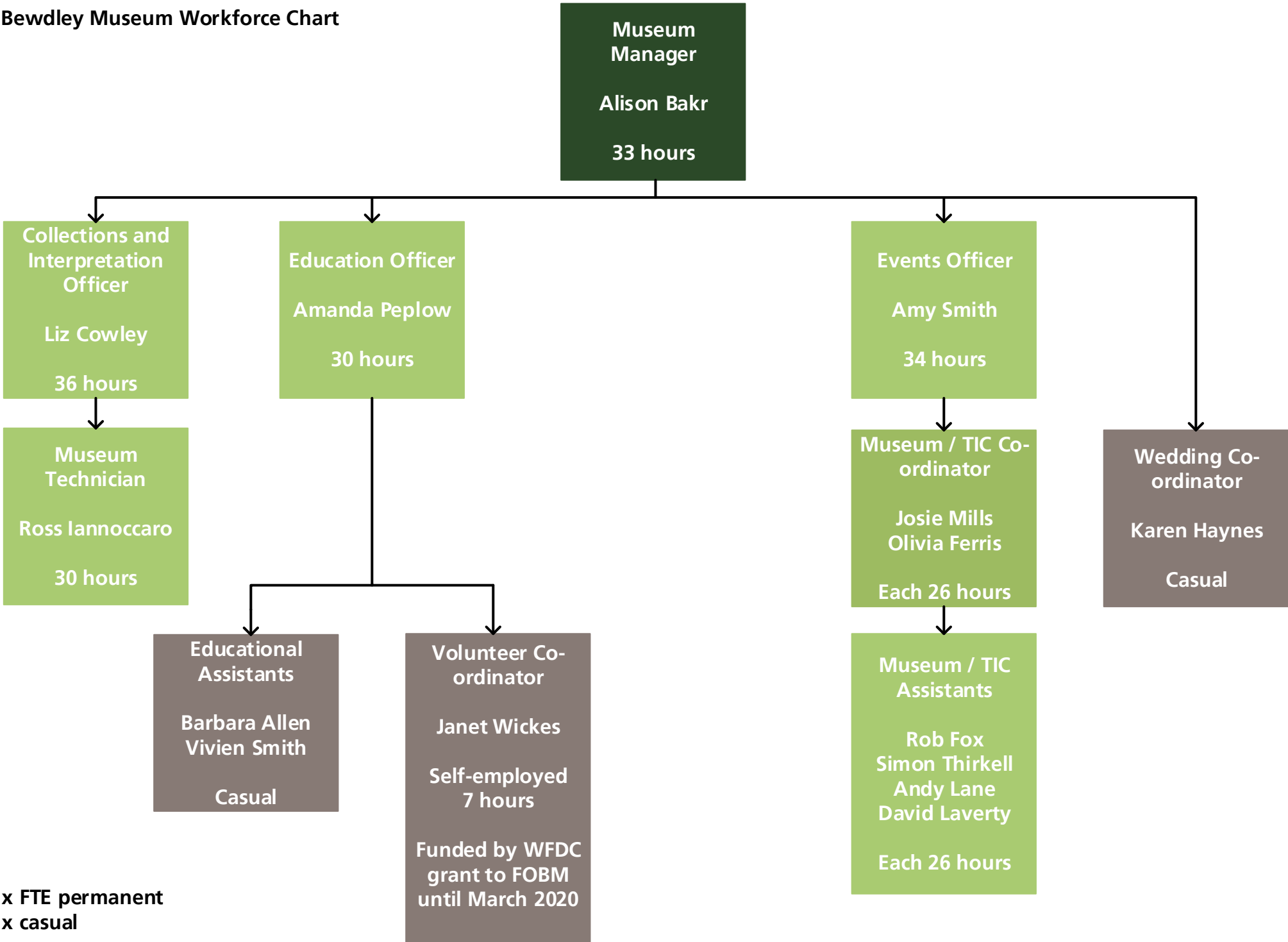


Chart 2 Income generation

4.3 Staffing

The current Museum staffing structure is set out below and this has been the same for the last 5 years.

Bewdley Museum Workforce Chart



12 x FTE permanent
3 x casual



5 Comparators, Case Studies and Potential Partners

5 Comparators, Case studies and Potential Partners

5.1 Comparators

The information below has been gathered from secondary sources as part of this options appraisal work.

5.1.1 Top 10 museums on TripAdvisor

Rank	Name	Location	Governance
1	Museum of Carpet	Kidderminster	Carpet Museum Trust
2	Tudor House Museum	Worcester	Worcester Heritage and Amenity Trust
3	Bewdley Museum	Bewdley	Wyre Forest District Council
4	Elgar Birthplace Museum	Broadheath	National Trust
5	Museum of Royal Worcester	Worcester	Museum of Royal Worcester (Registered Charity)
6	Avoncroft Museum of Historic Buildings	Bromsgrove	Avoncroft Museum (Registered Charity)
7	Forge Mill Needle Museum & Bordesley Abbey	Redditch	Rubicon Leisure on behalf of Redditch Borough Council
8	Greyfriars' House and Garden	Worcester	National Trust
9	Transport Museum Wythall	Wythall	Birmingham and Midland Motor Omnibus Trust
10	Almonry Museum	Evesham	Evesham Town Council

Table 6 Top 10 museums in Worcestershire on TripAdvisor

5.1.2 Charging rates at top 10 Museums on Trip Advisor

Rank	Name	Admission Fee
1	Museum of Carpet	Adults £5.50 Concessions £4.50 Students / children £3.00 Family £15.00 Children <5 Free Carers <5
2	Tudor House Museum	Free
3	Bewdley Museum	Free
4	Elgar Birthplace Museum	Adults £8.00 Children £5.10 Family £21.20 Group (15+) adult £7.60
5	Museum of Royal Worcester	Adult £6.50 (£16.50 annual) Concession £5.50 (£14.00) Children <16 Free
6	Avoncroft Museum of Historic Buildings	Free
7	Forge Mill Needle Museum & Bordesley Abbey	Adults £6.00 Children £2.10 Family £13.60
8	Greyfriars' House and Garden	Adults £6.20 Children £3.10 Family £15.50 Group (10+) adult £5.70
9	Transport Museum Wythall	Adults £12.00 Children £6.00 Family £30.00
10	Almonry Museum	Adults £5.00 Seniors 65+ £3.00 Students £3.00 Children <11 Free

Table 7 Charging rates

5.1.3 Visit England -West Midlands visitor data

Data has been taken from Visit England's Annual Survey of Visits to Visitor Attractions (2018) unless otherwise indicated.

Name	Location	Description	Visitor Numbers
Royal Air Force (RAF) Museum Cosford	Shifnal	Museum and /or Art Gallery	432,331
Shakespeare's Birthplace	Stratford-Upon-Avon	Historic House/ House and Garden / Palace	423,900
Black Country Living Museum	Dudley	Museum and /or Art Gallery	355,054
Croome Park (National Trust)	Worcester	Historic House/ House and Garden / Palace	269,261
Bewdley Museum	Bewdley	Museum and /or Art Gallery	246,470
Thinktank	Birmingham	Museum and /or Art Gallery	239,321
Baddesley Clinton (National Trust)	Solihull	Historic House/ House and Garden / Palace	229,833
Charlecote Park (National Trust)	Warwick	Historic House/ House and Garden / Palace	219,710
Hanbury Hall (National Trust)	Droitwich	Historic House/ House and Garden / Palace	202,848
Worcester Art Gallery and Museum	Worcester	Museum and /or Art Gallery	70,000*
Avoncroft Museum of Historic Buildings	Bromsgrove	Museum and /or Art Gallery	31,117 (2018)
Elgar Birthplace Museum (National Trust)	Broadheath	Historic House/ House and Garden / Palace	28,000 (2018)
The Commandery	Worcester	Museum and /or Art Gallery	25,000*
Worcestershire County Museum	Hartlebury	Museum and /or Art Gallery	20,000*
Tudor House Museum	Worcester	Museum and /or Art Gallery	18,347
Transport Museum, Wythall	Wythall	Museum and /or Art Gallery	10,000 (2018)

Museum of Carpet	Kidderminster	Museum and /or Art Gallery	10,000
Almonry Museum	Evesham	Museum and /or Art Gallery	3,505

Table 8 Annual visitor numbers to attractions in the West Midlands

Items marked with an asterisk are figures supplied by Museums Worcestershire

5.1.4 Other museums in Worcestershire

Research shows that there are around 15-20 further museums (or heritage centres) in the county that Bewdley Museum could benchmark with, however none are likely to be of a similar scale

- RAF Defford Museum, Defford
- Kidderminster Railway Museum, Kidderminster
- Museum of Local History, Malvern
- The Tudor House Museum, Upton upon Severn
- Norton Collection Museum, Bromsgrove
- The Infirmary, Worcester
- Bevere Gallery, Worcester
- Malvern Hills Geocentre, Colwall
- George Marshall Medical Museum, Worcester
- Churchill Forge, Churchill
- Pump Rooms, Tenbury Wells
- Tenbury Wells Museum, Tenbury Wells
- Wartime in the Vale, Evesham
- Pershore Heritage Centre, Pershore
- Worcestershire Masonic Library and Museum, Worcester
- Malvern Hills Gallery, Malvern
- Military Wireless Museum, Kidderminster

5.2 Case studies

5.2.1 Museums Worcestershire

In the past Worcestershire County Council and Worcester City Council had a joint museums committee (from September 2009) and a joint museum store. From 2010 Museums Worcestershire was formed as a management organisation to oversee the three venues, namely The Commandery, Worcester Art Gallery and Museum and the County Museum at Hartlebury Castle.

Museums Worcestershire has three museums with the overall management and collections funded by Worcestershire county and Worcester city councils.

The total budget across all areas is in the region of £1.2m, around one third of this is earned income (2 sites have paid entry) and the remaining two thirds is local authority funding.

The Joint Committee is made up of 2 county council and 2 city council councillors all of whom have to be cabinet members and they work as advocates of the museums service.

Museums Worcestershire has a store on an industrial estate which incurs considerable costs.

The City Council see heritage as very important and recognise the tourism value of the museums.

The Hartlebury Castle Preservation Trust (HCPT) operates from Hartlebury Castle as a separate entity to the (county) museum. HCPT has recently been involved in a large scale HLF bid on site. The current agreement with HCPT runs out in 2021 and the lease with HCPT until 2026.

In 2010 the County and City Councils invited other local authority museums in Worcestershire to explore the forming of a new joint organisation. After a considerable amount of work a detailed report was produced, WFDC considered the advantages and disadvantages outlined in the report. Some recommendations were taken from the report such as joint working for the Collections Officer. However, there were no financial gain or benefit to the management and efficiency of the museum at that time, after careful consideration this option was no longer considered.

The independent report was written in 2012, at the time of writing there was an estimated £85k investment needed to facilitate a transition to a trust for the three museums.

5.2.2 Banbury Museum Service

Banbury Museum Service is an Independent Trust which was set up in 2013 to take over the running of the local authority Museum. A Charitable Incorporated Organisation (Foundation Model) was originally registered in 2013. The Trust also has a wholly owned subsidiary company which is used for the retail activity of the shop on site.

The annual revenue saving realised has been in the region of £30k on an overall annual budget of approximately £600k. The Council contribution in 2019 was at around £390k per annum.

They have also raised £160k for capital refurbishment works and extending the gallery.

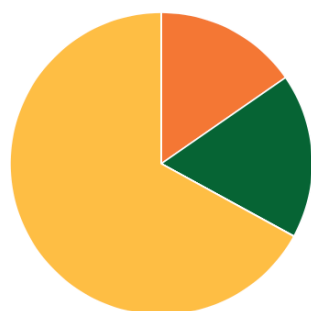
Trustees were hand-picked and all have skills to offer the Trust e.g. solicitors, accountancy, HR etc. The only council service provided is now IT.

An initial shadow board of Trustees ran all of the negotiations with the council so that the staff could focus on the museums themselves.

A fund raiser has been engaged and they look after donations, membership, grants and private funding. A fund-raising strategy has been developed. It is felt that museum membership and donations are key to their success plus the ongoing SLA from Cherwell District Council. The Museum returns to the charity Commission for 2019 show the following:

Income and Endowments:

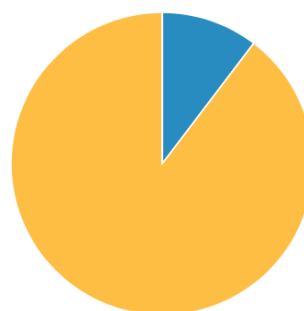
£668.9K



- Donations and legacies: £102.8K
- Other trading activities: £117.6K
- Investments: £0.2K
- Charitable activities: £448.4K
- Other: £0.0K

Expenditure:

£869.6K



- Raising funds: £90.0K
- Charitable activities: £779.7K
- Other: £0.0K

Of the Charitable Activities income around £390k is through the SLA with the district council and a further £45k from a university fund. Thus, the SLA is worth around 58% of total income in 2019.

Income has steadily increased over the 4 years of the Trust as shown in the table below.

Year	Income
2016	£620k
2017	£524k
2018	£625k
2019	£668k

Table 9 Trust income

The museum receives around 150,000 annual person visits.

5.2.3 Elgar Birthplace Museum

This was taken on by the National Trust from the 1st September 2017 for a period of 5 years on behalf of the Elgar Foundation. The National Trust have been contacted during the research stage of this work, but no reply was received from them. It is not clear what the circumstances were that led the Trust to take on the Museum, but anecdotal evidence suggests that the Trust who were running it were running into difficulty and also that the Hereford and Worcester Music Service moved out leaving vacant space. Information on the Charity Commission web site shows the Trust's income declining from £183k in 2014 to £59k by 2017. Media reports stated that the Museum was losing £50k per year and only attracted 8,000 visitors per year.

The National Trust had an ambition to get the visitor numbers to around 30,000 (stated in February 2017). The Worcester News reported that by September 2018 the numbers were up to 28,000.

5.3 Potential partners

There are a number of potential partner organisations locally and regionally.

5.3.1 Bewdley Town Council

Bewdley Town Council have been approached with respect to the idea of transferring the museum service, but this has not proved fruitful and, at the time of writing there are no ongoing discussions about any future funding contribution should the museum move to a Trust.

Given their low level of resources it appears unlikely that they will be a delivery partner. Also, should the whole site move to a Trust then WFDC will have to terminate a current agreement with the Town Council about use of the upstairs room and also an informal arrangement about the use of the 'Mayor's room' on the ground floor.

There have been discussions about the transfer of the gardens to the Town Council but this has not progressed at the time of writing this report. Furthermore, as will be explored in the options below, it is considered that the gardens ought to be part of an integrated attraction and thus managed as one organisation.

5.3.2 Museums Worcestershire

The position now is very different to that in 2012 a preliminary discussion with the Museums Worcestershire Manager has identified some key areas of joint working which could deliver positive impacts for both services.

Museums Worcestershire and Bewdley Museum represent four of the six local authority funded museums in the county. The others are

- Bordesley Abbey, Needle Museum – Redditch BC
- Almonry Museum – funded by Evesham Town Council

Four key areas for future joint working have been identified:

Storage – between the two services the cost of the current stores is around £100k per year. Both leases are set to expire in the next 5-6 years. Both services need to undergo a process of collection rationalisation and this will also establish what the physical space requirements for the future could be. Beyond this work is also the negotiation of a better deal and this could be something that a Trustee / benefactor would be interested in taking on. For example, a Worcestershire based estate agency might be willing to work on a pro-bono basis scope out potential opportunities and act on behalf of both services to negotiate a new lease(s). A complication could be that the archives for WFDC are held at the store and so they would need to be considered before a decision was made.

Collections / exhibition sharing – this is already planned for 2021 with the touring Ice Age exhibition owned by MW and set to visit Bewdley. There is a willingness to extend this and plan further ahead to look at what each collection contains and co-create themed exhibitions.

Benchmarking – both services gather similar management information. There is very limited evaluation in the sector regionally and very limited benchmarking as a result. Already sharing of information about the percentage of budget derived from external sources, from donations etc as well as cost per person visit has proved very useful but there is a need to develop a better collective evaluation framework and then link this to wider impacts such as the economic value of museums and heritage assets so as to link back to corporate plans.

Knowledge sharing – beyond data and management information there is an opportunity to share skills and knowledge. Each service has key strengths, and these might be complimentary such as commercialisation or collection management. There could be an opportunity not only to work together but also to offer training to independent museums across the county.

5.3.3 National Trust

As identified at 5.2.3 above, The National Trust has taken over the running of the Elgar Birthplace Museum. No details of the arrangement have been found.

The National Trust do have a clear acquisition policy which is set out below.

see <https://www.nationaltrust.org.uk/features/our-acquisitions>

We're one of the largest conservation organisations in the UK, so we receive a lot of requests to save heritage and countryside that's under threat.

This may be a building of special architectural interest, a local green space or a swathe of landscape at risk of development.

As a charity, we're dependent on the support of more than five million members, and sadly we cannot save everything at risk. To help us decide which acquisitions we can consider, we have a set of guidelines.

- 1. The property must be of national importance because it is outstanding for its natural beauty or natural or historic interest. Places of local importance whose distinctiveness transcends local significance may be regarded as of national importance.*
- 2. Ownership by the Trust should increase benefit to the nation. Such benefit is for future generations as well as our own. It can be provided through physical, visual and intellectual access and by the acquisition of properties to promote the protection of the environment. In certain parts of the country, e.g. highly developed and built up areas, this benefit to the nation may be greater than the inherent importance of the site might suggest.*
- 3. The property should normally be under threat. Coastal and estuarine properties of merit which are not under threat may be acquired under Enterprise Neptune. Threat is defined as a situation in which, without the Trust's protection, a place or building is in danger of deterioration, demolition, alteration or development that would be harmful to its character or environment.*
- 4. The property will not be acquired unless the Trust is the most appropriate owner. The most appropriate owner is one who has the skills, knowledge and experience for the particular needs of a property and of the communities in which it lies. They can also build on the opportunities afforded by ownership and can offer the required degree of protection.*
- 5. The property may be acquired to protect an existing property of inalienable standard. We may acquire land or buildings if their development could impact on nearby places of national importance.*
- 6. The property should be, and should be expected to remain, financially self-supporting. In the assessment of properties, consideration should be given to the management and financial consequences for existing properties and projects. All acquisitions are approved centrally as they must be considered of national importance. The cost of the acquisition and level of risk involved determines the level of approval the acquisition requires.*



6 The Future

6 The Future

6.1 Part 1 – the scope

The scope of what could be transferred into trust status could include the following;

- Museum and Guildhall – the physical assets of the buildings and external space, the type of transfer of legal arrangement between the Council and the trust are raised at 6.2.1 below. There is no current condition survey or costed programme of future repair and maintenance works required.
- The collection – following detailed discussions with the Collections Officer there are not perceived to be any legal issues with the council transferring the collection to a Trust. Also, there is no current condition survey with a detailed schedule of repair and conservation work.
- Gardens – the gardens are complimentary to the Museum offer, and also provide an opportunity to employ local gardener(s) who will work with volunteers, trainees etc. There would be an impact to the parks department which should form part of a larger review.
- Store – linked to discussion with Museums Worcestershire there are possibly cost savings from a shared facility in the future.

6.2 Issues to be addressed

6.2.1 Tenure of buildings and gardens

There needs to be discussion about the type of relationship that would need to exist between WFDC and any Trust or other organisation with respect of the ownership of the buildings and gardens. Options available include the following:

Type of arrangement	Advantages	Disadvantages
Freehold transfer to (new) Trust	Security of ownership for the Trust Asset has a (future) value – useful for financial loans	Cost of purchase to the Trust unless the council gift the asset / agree a nominal sum. An independent valuation would need to be undertaken but parts of the building are already owned by WFDC in their capacity as Trustee rather than local authority In the absence of an up to date condition survey the cost of repairs and maintenance unknown and would be an uncertain liability to a Trust
Long leasehold	As above	As above plus WFDC may impose a covenant restricting future use or development This would only be on the part of the Museum previously leased to rather than acquired by the Trust
Short term lease at fixed annual rent	Peppercorn rent Shared repair costs?	Cost of repairs and maintenance Short term WFDC may impose a covenant restricting future use or development No certainty for either the Trust or the Council

6.2.2 Ownership of collection

There are estimated to be over 26,500 items in the collection. This includes items that WFDC has ownership of title and also hundreds of items on long term loans some of which were loaned to the museum prior to the existence of WFDC.

There are not thought to be any legal issues with transferring the collection to a Trust however guidance does suggest that often the authority should retain legal title to the collection – should a Trust get into financial difficulties the collection could be treated as an asset of the Trust and could be seized by an insolvency practitioner to settle liabilities and debts.



7 Options Appraisal

7 Options appraisal

Following consideration of a number of options in an earlier draft, the council has refined the thinking down to two options.

7.1 A Modified Trust

Essentially this is a halfway house or a 'step change' option towards a fully independent Trust which brings some advantages around new skills and experiences at a strategic level, new financial opportunities and possibly greater ownership at a community level. It is a lower risk, lower investment option

7.1.1 What would be involved

- Establishing a board of Trustees instead of the current council committee
- Consideration of what assets should be transferred including the gardens and the length of any lease arrangement
- Consideration as to whether staff should stay with WFDC
- Establish clarity of traded activities and VAT implications and whether these should remain with WFDC
- Consideration of whether existing leases (e.g. café, craft units, Town Council) are transferred to the Trust

7.1.2 Financial implications

A fuller consideration of the costs of change is set out under section 8 below but this option does not realise all of the cost savings that a fully independent Trust would realise. The only tangible saving is through the Museum taking over the management and maintenance of the Gardens. Legal advice is needed about the payment of NNDR.

The costs of the step change would largely be officer time establishing the governance mechanism, financial and legal arrangements, recruiting and supporting a new board of Trustees.

The financial advantage is through the Trust being able to access grants and hopefully also donations and commercial sponsorship / support.

7.1.3 SWOT analysis

Option 1: Modified Trust	
Strengths	Weaknesses
<ul style="list-style-type: none"> • Opportunity to attract a new board of trustees that bring skills and experience to support the Museum • Achieves the Council's stated corporate aim of moving to a trust • Incorporate the gardens • Work in other parks - broadening the offer for the museum • Possible greater level of <ul style="list-style-type: none"> – Donations – Membership – Sponsorships • Better use of charitable status i.e. to attract grants 	<ul style="list-style-type: none"> • Savings are to the museum not the council so may not achieve the £50k saving - will reduce WFDC support staff recharges • Will require additional resources to recruit and train trustees plus to support the Trust – how will this be funded? • If WFDC cannot run trading activity, then Trust will need a trading arm (i.e. a separate company) resulting in additional accounting and reporting work • Requires significant restructuring of budgets • If trading through WFDC is it a dis-incentive to the trust?
Opportunities	Threats
<ul style="list-style-type: none"> • Trading arm – more commercially focused but would need investment • Council keeps freehold & leases to the Trust – Council could borrow capital to save for building or invest in building and lend to Trust – trust pay the revenue / interest costs. State aid implications would need to be reviewed if it was not at commercial rates • More of a partnership approach • Financial council contribution towards operating a museum through a Service Level Agreement • Opportunity from the trust to be free of 	<ul style="list-style-type: none"> • Is there any investment (e.g. commercial activity) funding stream within WFDC? • Liability for historic buildings unclear – no current condition survey or cost plan • Transfer of collections – is there a cost to transfer this. Also, no current condition survey or cost plan

current arrangements by WFDC with third parties e.g. Town Council	
Issues Arising	Sub Options
<ul style="list-style-type: none"> The costs of store - could reduce museum costs by moving the electoral and archive costs to the council. (These costs are not currently shared). Guildhall costs would need to be apportioned Implications to WFDC from back office recharges 	<ul style="list-style-type: none"> Buildings - Leasehold or Freehold Council retains the collection

7.2 An Independent Trust

This option is one step further than option 1 above, with everything transferring to a stand alone trust but the council continuing to make a financial contribution through a Service Level Agreement or grant arrangement. This option could be seen as the next step from option 1 and the natural progression towards an independent Trust.

7.2.1 What would be involved

- Establishing a board of Trustees instead of the current council committee
- Consideration of what assets should be transferred including the gardens and the length of any lease arrangement
- Staff would need to transfer to the Trust and
- An SLA would need to be established between the council and the Trust
- Traded activities (e.g. weddings) might well require a separate trading arm of the Charity to be set up
- All existing leases are re-negotiated by the Trust

7.2.2 Financial implications

The cost savings of this model are more significant than option 1 above as the Trust is free from existing council arrangements regarding internal charges and service provider contracts.

The ability to generate income is largely similar to option 1 above.

However, the cost of the transfer would be significant, previous museum transfers have been costed at between £85k (Worcester 2012) and up to £125k (York 2008).

7.2.3 SWOT analysis

Option 2: New trust	
Strengths	Weaknesses
<ul style="list-style-type: none"> • Museum service would make significant savings on budgets through removal of re-charges • Achieves the Council's stated corporate aim of moving to a trust • Allows the council (WFDC) to break the arrangement with the town council and frees the museum up to develop the guildhall • Enables a "clean sheet" approach to a governance model without bringing "debris" from the existing model • An independent trust might generate more public support and donations and access more grants 	<ul style="list-style-type: none"> • Council effectively loses income from NNDR and recharges • Will require significant investment to transfer >£100k • Investment may be required in buildings before Trustees would agree to take responsibility for them or an endowment to allow for future maintenance • Timescale either April 2021 or April 2022 depending on funding path chosen
Opportunities	Threats
<ul style="list-style-type: none"> • Tapering funding arrangement giving WFDC additional savings over the longer term • In-kind skills and support from Trustees 	<ul style="list-style-type: none"> • WFDC cuts re-charged service areas leading to redundancies • Changes to any SLA or grant in the future could be politically driven • Trust cannot recruit the trustees needed
Issues Arising	Sub Options
<ul style="list-style-type: none"> • Next condition survey due 2020 but this is not a full condition survey • Need a much more detailed condition survey of buildings and collection before any transfer 	<ul style="list-style-type: none"> • Buildings - Leasehold or Freehold • Council retains the collection



8 The Cost of Change

8 The Cost of Change

“The transfer itself comes with costs and needs careful planning. Like all change management if it is not planned well and communicated effectively, then it can easily flounder and fail”¹

A key driver from the council is to make savings to its net expenditure incurred in the operation of the museum. In order to begin to address this a trading profile has been constructed for all areas within the scope of the review. This has not been a straightforward task due to the complexity of the way the museum and gardens budgets are currently structured and also the number of sub-headings within each different cost centre. An attempt has been made to rationalise this as well as making predictions about future changes in income and expenditure based on current knowledge.

As has been set out earlier the Museum has increased its income generation over the past 5 years by just over 100% going from £65k to over £137k. This has been achieved with no increase in staffing and minimal financial investment.

8.1 Potential savings

The biggest savings to the Museum service budget through a transfer to a Trust come from the considerable central recharges made to it by the Council itself and thus these would only be realised with the creation of a standalone Trust (currently envisaged to be from April 2022 – see section 10 below).

Some key areas where savings can be made are as follows:

- Rates – whilst WFDC have not been able to confirm whether the Trust would qualify for an 80% reduction in Non-Domestic Rates this has been allowed for in the trading profile giving a saving across the Museum and Guildhall of around **£5,000**.
- Communications and computing – estimated savings in the region of **£18,000** if the museum is able to break free from WFDC recharges and commission local providers
- Shared store – possible saving of **£15,000**
- Financial services - estimated savings in the region of **£6,000** if the museum is able to break free from WFDC recharges and commission local support with alternative providers

¹ Renaissance Yorkshire

- Energy costs - estimated savings in the region of **£3,000**
- Cleaning costs - estimated savings in the region of **£3,000**

Subtotal savings £50,000

N.B. These would clearly see a reduced budget against the Museum costs but the impact to the Council's budget may not be as great, certainly in the short term, due to support services delivering services for a number of areas, building overheads being fixed and contracts in place for energy and cleaning.

A second area of savings against the Museum budget would be through the transfer of QE Gardens to the Trust and giving the Trust the ability to either procure gardening / grounds maintenance services itself or employ gardeners directly on payroll. The current total costs of £103,000 are excessive given the size of the gardens. Whilst they are Green Flag Award winning gardens there is scope for the museum to enhance the gardens to allow for increased association with activities in the museum such as weddings and education. There is also scope for improvement in horticultural standards and significant potential for volunteer involvement. This would require more detailed consideration and additional work will need to be done to look at potential savings. but it is initially envisaged that savings of around £35,000 could be made

Subtotal savings £35,000

N.B. The caveat above regarding to the Council's budget also applies to the gardens as the operatives will be working across other parks and it may simply not be possible to reduce the number of operatives immediately.

Total savings £85,000

8.2 Potential Income

Existing sources – the Museum team have reviewed current income streams (education, activities, shop, weddings etc) and allowed for modest growth over 5 years post Trust formation = **+£22,300**

Donations – these are currently usually below £2000 per year but, subject to a marketing campaign anecdotal evidence suggests that this could double. Museums Worcestershire generate 1% of income from donations (about £10k pa, Banbury Museum now runs at £100k per year of donations after 7 years of being a Trust. So, to move to that position over the next 5 years would seem reasonable. Final level of funding at 1% of combined museum and gardens gross expenditure = **+£4000** in year 5 of the Trust.

Commercial support – a trust has the potential to attract sponsorship and donations from corporate supporters. This will however take investment of time to build relationships,

develop the offer (web page, marketing material, producing an annual report, annual ‘thank you’ events etc) and deliver some pilots. The latter could be tried out during the feasibility phase below. The likely level of commercial interest is difficult to predict and thus a nominal allowance has been made at this stage in the trading profile = **+£5,000** in year 5 of the Trust.

Membership – in the past the Friends group ran a membership scheme which could be rekindled as per the Museums Worcestershire² model. At this moment a very conservative estimate has been made to reach a level of **+£1500** per year from year 2 onwards. This is definitely something to explore during the feasibility phase.

Lost income – assuming Bewdley Town Council no longer lease part of the Guildhall - **£660**

Total increase in income = **£32,140**

Expenditure savings (£)		Income increases (£)	
Rates	5,000	Existing sources	22,300
Comms and computing	18,000	Donations	4,000
Shared store	15,000	Commercial support	5,000
Financial services	6,000	Membership	1,500
Energy Costs	3,000	Lease	-600
Cleaning costs	3,000		
Gardens	35,000		
Total	85,000	Total	32,140

² <https://www.museumsworcestershire.org.uk/support-us/membership-at-worcester-art-gallery-and-museum/>

8.3 Net change over 5 years of Trust from current position

The trading profile shows that all of the changes shown at 8.1 and 8.2 above would reduce the net costs of operating the museum by **£114,000**. This would reduce the council subsidy to the Museum from £520k to £405k (78% down to 69%).

To make further reduction in the subsidy would require:

- Significant increases in donations and commercial support
- Significant investment in a membership campaign
- Much bigger savings on cleaning, insurance, services
- Reducing the repairs budget based on a condition survey and schedule of repairs

See scenario planning at section 8.7 below for more consideration of the income side of the equation.

8.4 Investment needed

Transferring the Museum to a trust is not an option that is cost neutral and it will require investment over a number of years and a commitment from the Council to continue to support the Museum trust through an SLA or grant arrangement.

In the 2012 study by Winckworth Sherwood estimated that the cost of transferring Museums Worcestershire to a Trust were in the region of **£85,000**. It should be noted that this excluded any consideration of conditions surveys to the buildings or collections. In 2008 York Museums estimated the costs to be “in the region of **£75k to £125k** depending on the level of external legal, financial and business support required”.

The model suggested is to apply to NLHF for a small grant to undertake the feasibility and detailed planning stage of the transfer process as follows:

8.4.1 NLHF application phase

A small budget of up to **£5000** would be sought should it be necessary to commission any external support for this phase of work.

8.4.2 Feasibility and detailed planning phase

Initial cost estimates suggest that this could be in the region of £124k to £167k depending on the scope but this would need to be refined before making a submission to NLHF. It is suggested that, in order to reduce risk, the Council undertakes soft market testing by

developing briefs for each element of work and approaching consultancies for an idea of costs.

The Project Enquiry Form to NLHF will generate response about their appetite to fund the process and the likely scale of funding required. It may be that they want a smaller scale application and that items will have to be value engineered out.

The council would be required to match fund the application at a minimum of 5% contribution but, in a highly competitive market, between 10% and 15% is suggested. Given the cost range above and the percentage range this represents between **£12,400** and **£25,000**.

8.4.3 Transition / transfer phase

Hopefully all costs for this phased can be contained within the NLHF application and with WFDC legal, HR, finance and admin support.

8.4.4 Operational / post transfer phase

The ongoing revenue commitment from WFDC to the Trust would be set out through a Service Level Agreement or grant.

The trading profile suggests indicative annual figures for the SLA. There is only a slight tapering of the contribution in the detailed picture for the first 5 years, as the biggest changes happen in year 1 of the Trust.

8.5 VAT

Specialist VAT advice is needed before any changes are made. No allowance for VAT has been made in the trading profile at this stage. Initial advice stated the following:

“The VAT position could be complicated and may result in it not being able to reclaim VAT on costs, depending on what it does.

In relation to the Museum's separation from the Council, the Museum will need to consider whether it can register for VAT which will depend on whether it has any taxable income. From the website it appears it runs a bar/cafe/giftshop so assuming it runs these itself there is scope for registering for VAT as this would be taxable income. Accordingly VAT on costs of running this element should be recoverable.

The website also suggests that the Museum allows free admission to the public and if it is going to continue on this basis it may be able to register under Section 33A of the VAT Act which would allow it to get VAT back on the costs which are attributable to its free admissions, although an application would need to be made to get the Museum included in the list before VAT recovery can be made I've attached a link to the HMRC guidance on this. If it is not within this scheme it would only get the VAT back on costs that are attributable to its taxable income not the free admission.

<https://www.gov.uk/government/publications/vat-refunds-for-museums-and-galleries>

If it is going to make a charge for admission going forwards, it will need to consider whether it qualifies for cultural exemption such that the admission charge is exempt from VAT. I've attached a link to the Notice below which sets out what is needed for cultural exemption which is mostly down to its articles and memorandum and how it pays directors etc.

<https://www.gov.uk/guidance/admission-charges-to-cultural-events-and-vat-notice-70147>

If it makes a charge for admission and does not fall within the cultural exemption the admission charges will be liable to VAT at the standard rate"

8.6 Trading implications

As mentioned earlier the Trust may well need to establish a trading arm particularly around its wedding activities. This needs to be explored at the feasibility stage.

Charities are restricted to trading activities which contribute directly to the achievement of their aims and objectives. Additionally, charities are restricted from trading which could pose a risk to their collections or assets. This means that selling tickets for entry to a museum is permitted, as would be running a café selling food and drink to users of the building. This is known as 'ancillary trading' and is therefore not liable for corporation tax. Likewise, rental income from property is exempt provided the profits arising are applied for charitable purposes.

However, going beyond this to raise funds through activities such as wedding hire events, or other commercial opportunities are not considered 'ancillary' and would be subject to tax.

Therefore, most medium and larger museums have established separate but wholly owned trading companies that pledge or gift aid any profits back to the parent charity. This is common practice within the charitable sector and permits trading to raise funds for the charity without losing the tax advantages.



9 Governance Issues

9 Governance issues

There will need to be a phased approach to the establish of a new or modified Trust which will need to include

- Consideration of the role of the Friends of Bewdley Museum – an open dialogue should be entered into about the future governance of the Museum, how volunteers are to be recruited managed and supported, how donations and membership are to be dealt with in the future. A new way of working needs to be developed and captured in a partnership agreement or Memorandum of Understanding based on a shared vision and aims;
- Consideration of the role of the Management Group – an early discussion needs to take place with this group also to discuss how they can help in the process and what role they, individually or collectively, want to play. Does this group become the steering group until such time as a board of Trustees are established? Are they the best placed group to negotiate on the Museum's behalf with WFDC or are their vested interests?
- WFDC full council effectively stepping down as Trustees – once the above discussions have begun the way ahead will start to become clearer but the elected members of the council need to consider who is best placed to become a Trustee should it be agreed that the authority plays such a role in the future. Since the authority will be a major funder it is highly likely that they will want to be part of the overall governance of the Trust.
- The recruitment and appointment of a shadow / interim board of Trustees (for option 1 as a precursor to option 2 if that is the preferred route, if not then they are the board)– the stages up to the Trust becoming independent will need a team of people willing to be advocates of the Museum, steer the process of transformation, negotiate with WFDC. The selection of the Chair for this process and indeed the full board of Trustees is crucial to the success of the new organisation as they can have a huge influence about culture, relationships and future direction.
- The recruitment and appointment of a full board of Trustees - In an ideal world the Trustees of any interim or full board would not only be knowledgeable about museums, education, heritage and culture but also have business, professional or management experience. There would need to be a planned Trustee recruitment and selection process including developing person specifications, role descriptions and a selection team. An initial approach could be to work with a specialist volunteer recruitment organisation such as Reach Volunteering

(<https://reachvolunteering.org.uk/>). There also needs to be consideration about how long Trustees serve and trustee training. These people could form a shadow board and then become the board when WFDC step down as owners and trustees.

As part of the feasibility phase all of the above needs to be considered and thoroughly planned out.

“Selecting and appointing the right Board members will be critical to the success of the initiative.”



10 Timescale

10 Timescale

Within appendix A an overall timetable has been set out in 4 phases.

10.1 NLHF application phase

During the development of this report a small grant application has been scoped out and a Project Enquiry Form submitted. Subject to NLHF feedback on the scope and scale of the enquiry this will need to be worked up to a full application for a small grant. This may require external support.

It is envisaged that this work could be completed by **Autumn / early winter 2020** with an announcement before the end of 2020.

10.2 Feasibility / detailed planning phase

The initial scope of this phase is set out in appendix A. The detail about how this phase is delivered needs careful consideration but it is suggested that as many early actions to assess financial implications are carried out such as building conditions surveys, collection condition survey, landscape maintenance schedule, funding strategy, business planning etc. A key gateway needs to be built into the programme at this point.

Subject to the NLHF application being successful then this work should be able to be completed within **12 months i.e. January to December 2021**.

10.3 Transition / transfer phase

It is likely that this phase would need to run concurrently with the latter part of the above phase. After approximately half way to two thirds of the way through the feasibility phase there would need to be a clear decision that a changed Trust arrangement was indeed the best way forward. At this point work would need to be commenced on establishing a new Trust or converting the existing one; setting up a new trading arm; recruiting trustees for a shadow board; agreeing a transfer date; beginning TUPE processes etc.

Seven months has been allowed in the draft programme for this phase by working backwards from a notional launch date of 1st April 2022.

10.4 Operational / post transfer phase

As set out earlier, this phase is likely to start on the **1st April 2022**.



11 Risks

11 Risks

As cited in several key reports on transfer to Trusts there can be many reasons that can mitigate against the set up of a trust:

- Legal issues – these have been highlighted in this report relating to the physical assets, the collection, trust status etc
- Financial – the current trading prolife figures do not give the level of savings that are desired by WFDC in year 1 (£50k) or in the longer term (nearer £250k)
- Impact on the authority – the biggest savings come from central re-charges and grounds maintenance and they will have a very significant impact on central and operational services which may well lead to redundancies or mean that the savings cannot be delivered as they have to be absorbed elsewhere in the authority
- Political opposition – this is most likely from the members of the Management Group will only back a transfer that is seen as beneficial to the Museum itself
- Stakeholder dissatisfaction / opposition – the message has been very carefully controlled to date by all involved in the process so far. Everyone has been very clear that this is an options appraisal and that it is about securing a sustainable position for the Museum.
- The museum will play a critical role in the regeneration and recovery of the town after the impact of Covid 19,
Should the council push for greater savings or try to accelerate the process there could be significant opposition instead of support. Management of the transition would be critical to ensure community and visitor backing.
- Lack of capacity – the options appraisal process has shown that staff are at capacity. A feasibility study and detailed planning process could not happen without external support
- Investment – no budget currently provided to transfer the Museum to Trust and should the NLHF bid not be successful it is unlikely that WFDC will set aside the level of investment needed.



11 Recommendations

12 Recommendations

Changing the current Trust arrangements is complex matter that will require a well-planned and well-resourced phased approach such a Transfer might bring benefits to both the council and the Museum.

Other reports both locally and nationally have set out guidance on costs and timescales for a transfer and these have been used to inform our collective thinking on how this process could be resourced.

The world has changed greatly since the initial draft of this report. Wyre Forest District Council has had to change and is in the midst of considering how it responds to whatever the 'new normal' will become. This thinking has revised down the number of options being considered and also, at the time of writing, the possible sequencing of such options.

Perhaps it is now no longer a case of 'either / or' but a case of "now / later" in how the council moves forward with Bewdley Museum.

Option 1 can be considered as a step change on the path to a fully independent Trust as long as it delivers a better museum service. It will not deliver the scale of financial savings that were originally a driver for this work but it could generate additional income. It requires a lesser degree of investment from the council to effect the changes required and exposes the Museum service to a lower degree of risk.

Option 2 should not be shelved instead consideration should still be given to a future NLHF application to do the full feasibility work required. Given that NLHF closed all grant programmes except Heritage Emergency Fund due to the Covid 19 outbreak, it is not currently known what grant programmes will re-emerge or whether indeed lottery distributors will see moves to a trust as more or less risky in the light of pandemic experiences. Such a route would also reduce the financial implications to the authority of moving to option 2.

The NLHF process could create that space and time, provide the resource needed, bring in specialist help and maximise the skills and knowledge of those already involved from staff, Friends, Management Group and other stakeholders. A well planned and inclusive process could galvanise support for a well-loved and much valued Museum that makes a very significant contribution to not just Bewdley but the wider area. The opportunity also exists to work more closely with Museums Worcestershire to create stronger and more resilient services to the county as a whole.



Appendix A Scope of small grant application to NLHF

NLHF Small Grant Application Scope

The buildings

In order to assess the likely ongoing repair and maintenance costs a full Condition Survey needs to be carried out along with a Mechanical and Electrical Survey.

In order to assess the likely future development potential Conservation Architects, need to be commissioned to work alongside other members of the project team to assess what options there are for moving functions around and gaining better access to some areas. They will also need a Quantity Surveyor as part of their team.

It is suggested that the architects commission the two surveys set out above and produce a 5/10 year costed repair programme.

The landscape

The production of a costed maintenance schedule with 5/10-year investment plans.

The collection

There are three key components

- Developing a joint approach with Museums Worcestershire
- Rationalising the current collection ahead of any joint store
- Engaging a freelance conservator to assess the current condition of key items of the collection and suggesting a 5/10-year capital investment programme

The finances

There are two interwoven components:

- Developing a 5/10-year business plan for the Museum, Guildhall and Gardens
- Developing a fundraising strategy

The organisation

To establish a new trust with a new board of trustees, new financial systems, transferring staff, along with all of the legal issues will take a significant amount of time and resource which is likely to be far greater than any current WFDC employee has time for. Specialist legal, VAT / financial and HR help is needed.

The message

Managing a process of transfer needs a clear and positive message from the outset until launch. Components include

- Developing and delivering a marketing and communications plan
- Community consultation and stakeholder engagement

The project

This is a complex project and one that will need managing. It is suggested that there are 3 elements to this:

- Project lead – Museum Manager, approx. 2/3 days per week
- Operational Manager – to backfill the operational duties of the current Museum Manager
- Project Manager – an external consultant to support the project lead

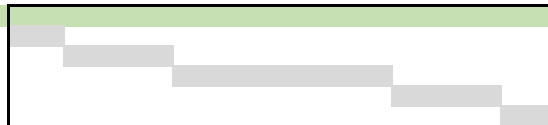
Initial cost ideas

	Low	High
The buildings		
Conservation architect	1	1
Quantity surveyor		
Condition survey		
M+E survey		
The landscape		
maintenance schedule		
The collection		
joint approach with MW	N/A	N/A
collection rationalisation	N/A	N/A
Conservator		
The finances		
Business plan		
Fundraising strategy		
The message		
marketing and communications plan		
Community consultation and stakeholder engagement		
The project		
project lead	N/A	N/A
operational manager		
project manager		
SUB TOTAL	113000	152500
10% contingency	11300	15250
TOTAL	124300	167750

March April May June July August September October November December January February March April May June July August September October November December January February March April May June July

NLHF application phase

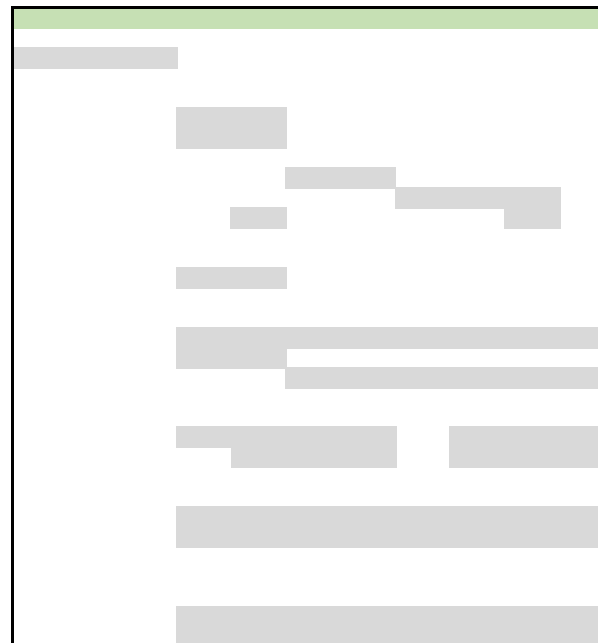
Project Enquiry Form
HLF Liaison
Work to complete Small Grant Application
Submit small grant application
NLHF assessment



Feasibility phase

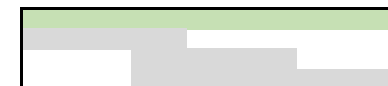
Recruitment / procurement

The buildings
Condition survey
M+E survey
Conservation architect
initial scoping
sketch scheme
Quantity surveyor
The landscape
maintenance schedule
The collection
joint approach with MW
Conservator
collection rationalisation
The finances
Business plan
Fundraising strategy
The message
marketing and communications plan
Community consultation and stakeholder engagement
The project
project lead
operational manager
project manager



Transition phase

Establishment of Trust
Recruitment of trustees
Transfer process



Operational phase





Appendix B Additional visitor survey mapping and analysis

Bewdley Museum Visitor Survey 2015 – Additional Postcode Analysis

A visitor survey was carried out at Bewdley Museum between April 1st 2015 and September 30th 2015. A total of 378 questionnaires were completed, of these 349 respondents gave valid postcodes.

Figure 1 shows the distribution of visitors across the UK. With over four fifths (84.5%) of respondents, the majority came from within the West Midlands. The furthest away was 184.4 miles from Newcastle.

Figure 2 shows the local distribution of visitors. A large number came from the Dudley and Sandwell areas, with small numbers also from around Redditch, Bromsgrove and Solihull. Around a third (34.1%) were from within the 10km buffer and a quarter (24.6%) from within 5km. A tenth (11.7%) lived within 1km of Bewdley Museum.

Figure 2 also shows the boundaries of Wyre Forest District Council. Analysis shows that 30.7% of respondents were from within Wyre Forest.

Figure 3 shows respondents from Kidderminster and Bewdley. A total of 31 respondents came from Kidderminster, making up 8.9% of the total respondents. Around one in seven respondents (14.9%) were from Bewdley itself.

Figure 4 shows the distribution of postcodes by postcode sector to indicate the density of respondents from each area.

Bewdley Museum

Figure 1
Visitor distribution
across UK

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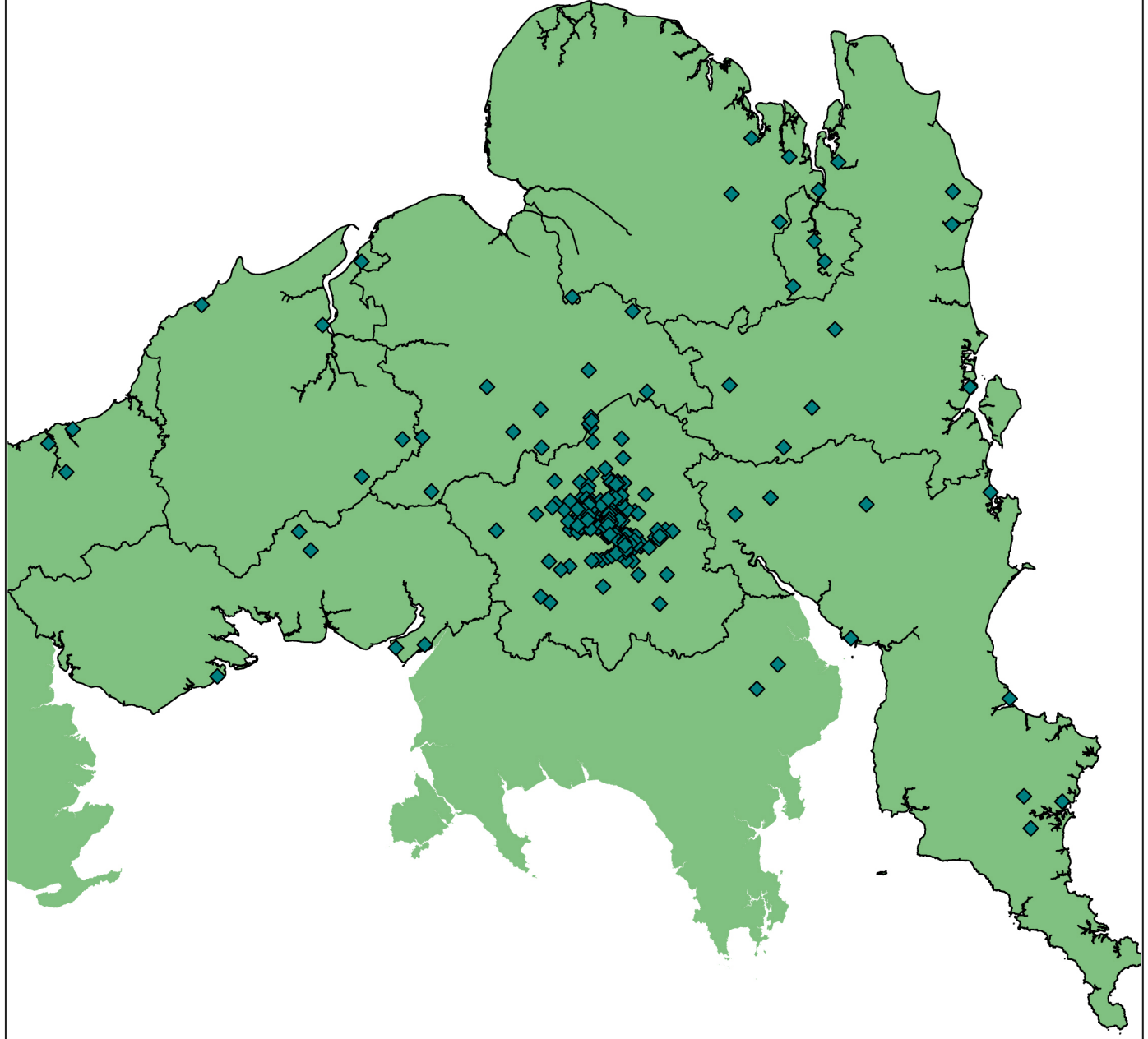
Visitor Survey Respondent

Regions

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 **Wyre Forest**
District Council



Bewdley Museum

Figure 2
Local Visitor Distribution

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Visitor Survey Respondents

Museum Location

1 km buffer

5km buffer

10km buffer

Wyre Forest

Local Authority
Boundary

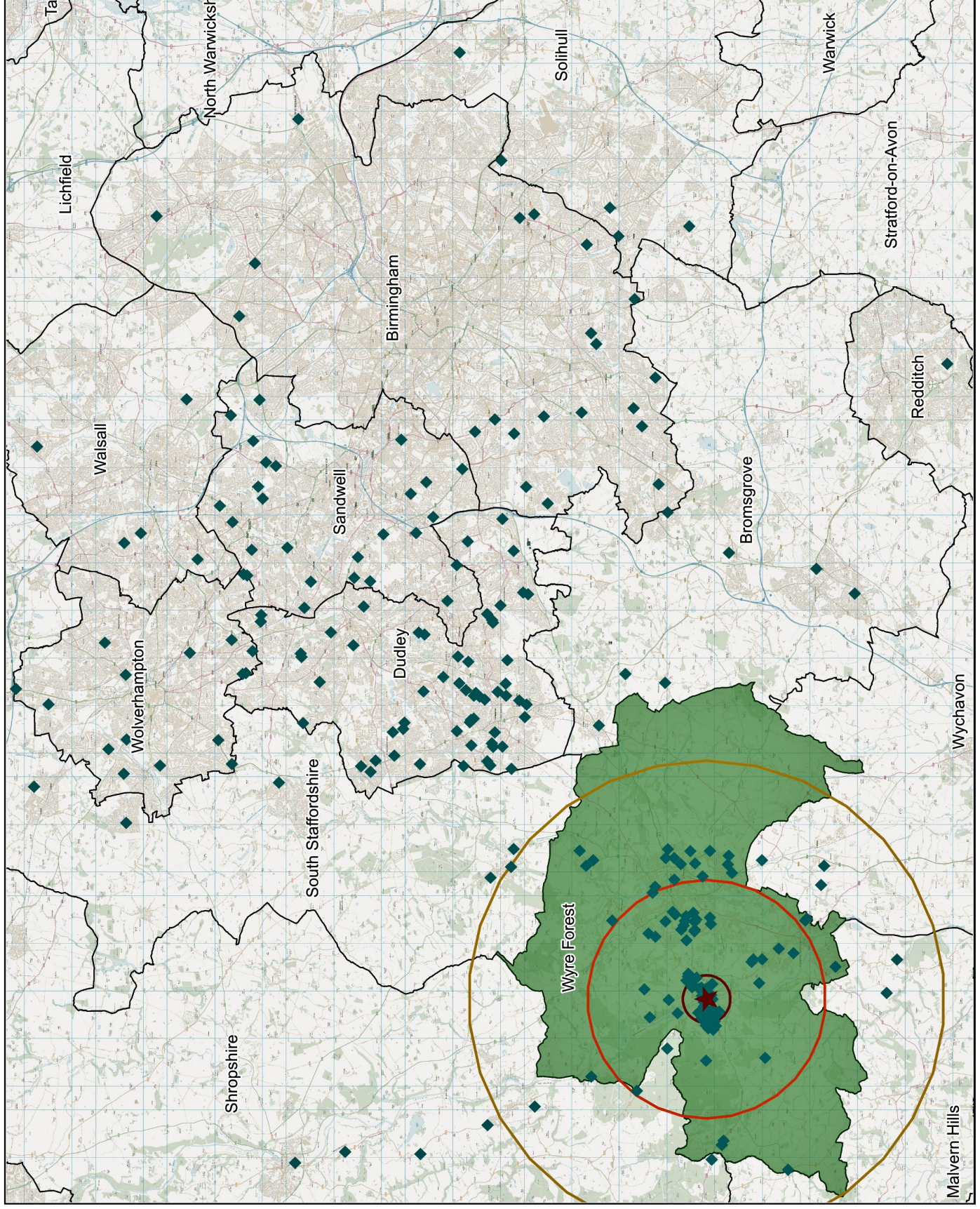
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Drawn by:
LH

Date: 10/03/20



Wyre Forest
District Council



Bewdley Museum	Figure 3 Bewdley and Kidderminster Respondents
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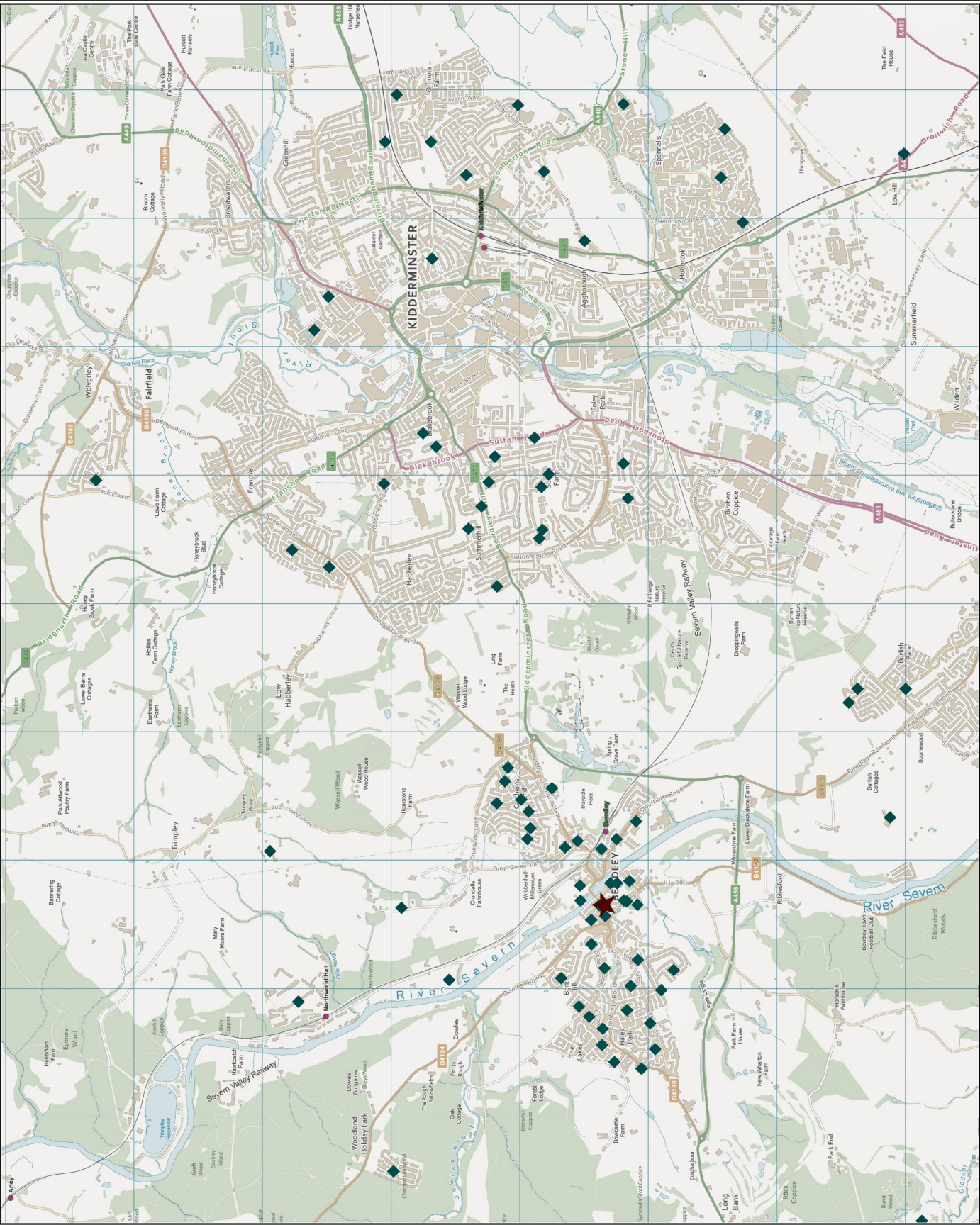
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B

10/03/20



sample spaces places





Appendix C Performance framework model



Appendix D Economic impact modelling