



BISHOP'S
WALTHAM
MUSEUM

FORWARD PLAN 2021 - 2026

1. Introduction

Bishop's Waltham Museum Trust ('the Trust') was founded in 1987 and moved to its present location, *the Farmhouse* in 2009. This is in the grounds of the privately-owned *Bishop's Waltham Palace*, under the guardianship of English Heritage. The Museum gathers onto a single site historical collections relating to Bishop's Waltham Parish and artefacts and displays connected with the Palace itself.

The Trust holds full Museum Accreditation, and is a CIO (Charitable Incorporated Organisation). Under a Managed Property Agreement ('MPA') with English Heritage ('EH'), the Trust manages Bishop's Waltham Palace and Grounds on a day-to-day basis, whilst occupying the Farmhouse as tenants of EH.

2. Mission

Our mission is to enable visitors to gain an understanding of the historical development of the local area, as well as of Bishop's Waltham Palace, which was a residence of the Bishops of Winchester in the Middle Ages, and a place that King and Court would visit and reside from time to time. Through its Collection and resources, the Trust's aim is to illustrate and interpret the social heritage of Bishop's Waltham Parish and surroundings for the enjoyment and education of all.

3. Values

We are a community-focussed organisation working to bring enjoyment and understanding to those who live and work locally, to visitors and tourists.

We endeavour to care for and develop our collections and to enrich lives through learning and understanding.

We seek to maintain an excellent working relationship with our partner, English Heritage, to build mutually beneficial relationships with local schools, community groups, companies and institutions, and to benefit from the experience of local and national Museum Services.

We value greatly the natural environment in which the Museum and Palace is set, and are committed to facilitating its availability to all as a beautiful green space.

4. Key Aims

The Collection

We will:

- promote enjoyable learning opportunities for all through the display and interpretation of the Collection.
- develop relationships with the wider community to stimulate curiosity and wonder, encouraging opportunities for deeper engagement with the Collection through exhibitions, talks and events.
- Safeguard, conserve and develop the Collection for existing and future generations
- provide physical and online access to the Collection, particularly to the photographic archive.

The Palace and Grounds

We will

- use the Palace and grounds as a valuable resource both for those who live and work locally and for visitors, inviting them to relax, explore and wonder.
- achieve this by opening them as often as possible and through our day-to-day management of the site, combined with our educational programmes and other promotional activities.

5. Review of previous plan and achievements

- Renewed MPA with EH for a new 4-year period to March 2023.
- Completed Succession Planning, with the appointment in 2019 of a new Collections Manager, Chair and Treasurer. Have shared tasks more widely amongst new and existing Trustees and Volunteers.
- Improved financial recording and presentation.
- Reduced the documentation backlog such that only 10% of the artefacts and archives remain to be catalogued.
- Acquired the Austin and Wyatt Collection and made good progress towards sorting it before distributing those items not wanted.
- Held one major exhibition in each of the past 5 years (excluding 2020)
- Increased volunteer stewards leading to doubling of opening hours.
- Started the process of reforming the Trust into a Charitable Incorporated Organisation (CIO Association). We are now simply waiting for Barclays Bank to allow us to close our old account and open a new (CIO) one, to complete the process.
- Begun publishing a series of booklets on recent exhibitions.
- Developed / Improved relationships with a range of local institutions, societies and schools.
- Created a new website with more resources for the community
- Made EH aware of problems in the building leading to replaced heating, overhauled alarm system and improved access to the upper floor with a handrail to the stairs

5a Review of consequences of Covid in 2020

The Museum responded to the COVID outbreak by adapting the way in which the Farmhouse was accessed. By developing plans quite quickly, it was possible, between the two periods of lockdown, to open in a limited way. In addition, a virtual exhibition and a booklet were produced for the website, both themed around the VE and VJ day anniversary so that parts of our collection were on view. Since it was not possible to start the process of doing proper market research during 2020 to help create the Forward Plan, surveys have been built into the Action Plan in 2021 instead.

Special efforts were also made to extend the opening hours of the grounds, and this was appreciated greatly, with large numbers of people making use of them during lockdown (as evidenced on Social Media and through word of mouth feedback).

6. Priorities

We set out below the five broad areas for development over the next five years based on our Key Aims. Our most significant plans for the first two years are shown in italics and are expanded into a SMART Action Plan (Appendix 1). The latter takes full account of, and is cross-referenced to, the 2019 SWOT analysis (Appendix 3).

1. Make the Museum of more value.

- *Determine if increased opening hours are possible/desirable*
- *Decide if Cashless donations scheme would be worthwhile*
- *Hold one major exhibition per year*
- *Look for ways to engage with younger generations*
- *Investigate value and expense of historical Town Model*
- *Achieve Re-Accreditation*
- *Achieve MPA renewal for 5-9 yr period*

2. Conserve and Improve the Collection so that it is safeguarded and updated.

- *Determine and address current risks to the Collection*
- *Scan and catalogue the Bosworth Photographic collection and the Austin & Wyatt archive*
- *Review Collection Development policy and Emergency Plan*
- *Improve how the Collection is displayed and stored.*
- *Restore the two Padbury clocks*
- *Develop on-line research facilities*

3. Improve communication and marketing so that the Museum is clearly visible to the local community
 - *Determine which, if any, additional personnel may be required to assist with surveys*
 - *Collate existing Visitor Reviews of the Museum*
 - *Survey all Stakeholders to determine how the Museum may be of greater value – use to review Key Aims, Priorities and Action Plan*
 - *Install external signage*
 - *Increase the number of Members to 70*
 - *Annual review of Social Media presence*

4. Improve the physical environment of the Farmhouse so that it is a pleasure to visit
 - *Keep under review significant improvements and repairs that may be needed, and raise with EH accordingly*
 - *Keep under review re-occurring issues and minor repairs that are needed, and liaise with EH accordingly*
 - *Establish a regular cleaning programme*

5. Establish and maintain an effective Trustee body.
 - *Identify missing skills and any inability by the existing Trustee Body to complete the Action Plan within the timeframe set*
 - *Actively identify/seek candidates according to need*

7. Finance

Income and Expenditure Summary 2020

Income	£	Expenditure	
£			
Friends subscriptions	480	Conservation	364
Donations at museum	148	Printing /Stat.	91
Donations (other)	1,969	Exhibitions etc.	221
Gift Aid	1,260	Equipment	404
Net book sales	33	Trips/Hosp. etc.	46
Rates & Ins grant/refund.	904	Rates & Ins.	1,260
Grants	10,668	Website	489
WW2 Booklet (net)	240	Subscriptions	116
		Misc. expenses	230
Surplus	12,480		

In 2019 income exceeded expenditure by £2,000 and we started 2020 with 'free funds' (un-allocated to any specific project) of nearly £7,000. Covid removed any possibility of income exceeding expenditure in 2020, but instead we received the 'Covid-related' Small Business Grant of £10,000 which, paradoxically, has left us financially much stronger. At the year-end (2020) total funds were £19,400:, comprising:

General Fund	£6,400
Ring-fenced grant	£10,000
Oral History Bench fund	£3,000

In 2021 the Museum Trust received a Covid restart grant of £8,000 and the Oral History Bench fund was utilised for the stated purpose

Appendices

1. Action Plan

The Action Plan sets out how we will achieve our Priorities over the next two years (using SMART criteria), enables us to monitor progress, and to create a new Plan for 2023 and beyond. A detailed working document, the Action Plan is not currently uploaded to the Website.

2. Budget

The budget flows from the 2020 accounts, and allocates funds to the Action Plan as follows:

General Income and Expenditure

Estimates for 2021 and 2022 are based on 2019's figures, given the unusually circumstances in 2020.

Extraordinary Expenditure

This is categorised into three *Types*:

- 1) Materials (cabinets/storage/lighting/displays/signage) in support of existing museum activities
- 2) Exhibitions.
- 3) Special projects from 'ring-fenced' funds. E.G. such as a historical model of the town; new exhibits otherwise beyond our usual reach; enhanced child-friendly content.

This budget would result in us starting 2023 with reserves of £14,000, having made a surplus of £3,500 in ordinary operations, fund-raised £500 (SWOT O. 5) and having spent £12,400 in exceptional expenditure.

3. SWOT Analysis (2019)

Strengths

1. The only museum dedicated to Bishop's Waltham with a varied collection of artefacts, archives and photos.
2. The museum site is of significant historical interest, being the ancient Palace and Grounds of the Bishops of Winchester.
3. The museum is in the centre in the town of Bishop's Waltham, and has attractive open space and a car park for easy access.
4. 4-year Managed Property Agreement with EH.
5. Committed, dynamic, and locally based trustees and volunteers
6. Support of the Parish Council and other local organisations
7. Support of the local English Heritage team, Winchester City Museum and Hampshire Cultural Trust.
8. Acquired Accredited Museum status in 2015.

Weaknesses

1. Physical limitations of the Farmhouse, an environment which can be cold (especially in winter) for the Collection and those who work there. Limitations on electrical sockets and lighting possibilities
2. Shortage of expertise.
3. Limited storage facilities for, and access to, the Collection.
4. Absence of visitor facilities (toilets, shop, coffee shop etc.)

Opportunities

1. Capacity to raise the profile of the museum in the local community and beyond.
2. Potential for extended opening hours, including Bank Holidays
3. Develop partnership with District Museum Services / joint ventures with EH.
4. Potential to attract new Members.
5. Explore funding / grants for specified projects.
6. Increase skills and knowledge of collection management and care.

Threats

1. 4-year Managed Property Agreement is dependent on renewal by EH.
2. The maintenance and facilities of the building are dependent on EH.
3. Collection integrity is affected by the environment within the building together with normal threats

4. Risk Assessment

We revised our Risk Assessment in July 2020 and May 2021 to incorporate the effects of Covid-19 on volunteers and visitors. It incorporates the site requirements and museum recommendations of English Heritage.

5. Access Statement

To be added in due course

6. Supplementary Information

Location

3 Station Road, Bishop's Waltham, Hampshire SO32 1DH

Charitable Incorporation Organisation (CIO)

An Association CIO is a legal entity specifically intended for non-profit organisations whose members (Friends) have voting rights. A CIO is registered with the Charity Commission only, and not with Companies House. Our CIO number is 1188140.

Accreditation

Accreditation is the Arts Council's standard by which museums in England are judged. It has been designed to assist museums to conduct their business in a professional manner and for their governing bodies to assess their performance. Our existing Accreditation has been extended (by Covid) until Sept 2022, and the quality of this Forward Plan will play a key part in a successful renewal.

English Heritage – Managed Property Agreement (MPA)

The MPA is a 4-year agreement between English Heritage and the Trust by which the latter is responsible for the day to day care and management of the Palace and Grounds. EH retains overall control and care together with liable for any financial outlay. EH is also responsible for the upkeep of the Farmhouse, where the Museum collection is held. The current MPA runs until March 2023 and, following discussions with EH, we shall seek a longer renewal period when it expires.

EH is half way through a £1 million refurbishment of the walls of the Palace Ruins, that have been affected by ivy, and the repair and replacement of the grounds' entire boundary walls. The work will be completed by the end of 2021.

Stakeholders

Many individuals and organisations have a stake in Bishop's Waltham Museum. These include Friends/Members, volunteers, residents, visitor's, local businesses, the Bishop's Waltham Society*, Town Team**, Parish Council***, Photographic Society, local churches, schools and the Trustees. Of special importance is the relationship we have with English Heritage.

* Organisation with which the Trust has two-way representation.

** Organisation on which the Trust is formally represented

*** Organisation with a representation on the Trustee Body

Visitor Numbers

2014: 2088	2018: 2597
2015: 2100	2019: 2415
2016: 1700	2020: 497
2017: 3300	

Major Exhibitions

2014 - D-Day exhibition 2015 - Agincourt
2016 - Abbey Mill and the Pond 2017 – Shopping through the ages
2018 - John Bosworth – Local photographer, historian and naturalist
2019 - Industrial History (Brickworks); Anglo-Saxon project with BW
Jnr School

Future Planned Exhibitions

2021: *Maps & 2020 Vision* – to include photographs taken by members of the local community and a re-interpretation of the *Farmhouse*,
2022: Henry VIII and the Treaty of Waltham (1522)
2023 and beyond: The Austin and Wyatt Archive; Pre-history; Sport and Leisure.

Previous Community Engagement

Kidstreet (in the High Street), a free community event for children;
Kids in Museums take-over day: Swanmore Guides Pop-up exhibition in 2018; Parish Church Festival participation; Uniformed organisation (Guides), historical societies and other organisation, visits; attendance and participation in BW Parish Council AGM in 2019. Permanent space (Spotlight) in Parish Magazine is available for the Museum to advertise/inform. The BW Festival Picnic took place in June - approximately 200 visited the site, and SamJam (charity music day) happened on the Bank Holiday at the end of August and approximately 600 attended.

The existing Oral History project has targeted community memories from the 1950s and 1960s.