

## Museum Manager job description

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### Museum Manager Job Advert

#### Museum Manager Cumbria's Museum of Military Life

##### About the Role

Cumbria's Museum of Military Life is seeking an experienced and dynamic person to takeover the leadership of our thriving museum. The current curator retires after leading a complete transformation of the museum through a four year £1.5million HLF funded programme. This included moving the museum within Carlisle Castle, completely renewing the exhibition space, transforming the museum's operating model and achieving Art's Council England Accreditation. Cumbria's Museum of Military Life enjoys enviable visitor satisfaction achieved by a small dedicated full-time team supported by a vibrant volunteer programme and group of friends. As well as healthy visitor numbers the museum team run a full programme of outreach programmes with the local and regional community.

##### About you

We are seeking a leader who will relish the opportunity to continue the substantial progress we have achieved. We need someone who is a great team player, and able to maintain the vibrant outreach programme. You will have a deep interest in the impact museums can make and an affinity with military history. You will also bring the energy and dynamism to strengthen our commercial activities and make the most of digital opportunities. The post attracts a salary of £26-28K and 25 days holiday.

##### Application and Interview

Applications are invited by close of 25<sup>th</sup> November 2019. Applications should include a suitability statement of no more than 2 pages together with a CV and two referees. An applicant pack including a full job description is available on the Museum Web site at

<https://www.cumbriasmuseumofmilitarylife.org/>. Applications may be submitted by post to the museum or by e-mail to the current curator [stuart.eastwood@cmoml.org](mailto:stuart.eastwood@cmoml.org).

We plan to interview for the post on the 4<sup>th</sup> December with a view to the appointee starting the role in February 2020.

## **YOUR RESPONSIBILITIES**

This role is responsible for the strategic development and operational performance of Cumbria's Museum of Military Life. You will help us to become resilient and sustainable by developing our audiences, ensuring high quality services for all our users and identifying ways to diversify our income streams. You will provide strong leadership for the staff team and oversight of all operational activities. You will also be a key external advocate for the museum, promoting its work and forging relationships and partnerships to develop the profile and impact of the museum with our regimental, local and visitor communities.

## **KEY AREAS OF DELIVERY**

### *Strategic planning and implementation*

You will lead the delivery of our Forward Plan to help us achieve the museum's strategic aims. You will work with the Chair and Trustees to formulate and regularly review the museum's mission, values, strategic priorities and objectives. You will ensure the museum and its commercial and trading activities are well managed to meet the museum's visitor and income targets and museum accreditation standards. You will put in place effective processes to monitor progress, regularly reporting to the trustees and updating plans as required.

### *Leadership and management*

You will provide strong leadership to staff and volunteers, ensuring everyone has a clear understanding of the museum's plans and their roles in putting those plans into action. You will ensure the museum has robust Human Resource policies, practices and performance management processes to attract, motivate and retain a committed, effective and professional team. You will help staff to work to their full potential, by supporting them to develop their skills and knowledge.

### *Collections management, access and engagement*

You will oversee the care and curation of our collections and archives, to enable us to engage our visitors and communities with the stories of Cumbria's regiments and meet Museum Accreditation standards. You will also seek to develop the collection and maintain its relevance. With the support of the Learning and Access Officer, you will oversee our learning and access activities and our temporary exhibition programme to help grow engagement with our visitors and communities.

### *Visitor services*

You will ensure the museum provides high quality services to all its users by encouraging staff and volunteers provide excellent standards of customer service and making sure the museum exhibition spaces are well-maintained. You will ensure the premises are well-managed by creating a culture of compliance with statutory regulations and organisational 'must dos', including fire, security, emergency procedures and health and safety. With the support of the Museum Assistants, you will oversee facilities management including relationships with contractors and suppliers (e.g. café contract, IT systems suppliers).

### *Finance and Income Generation*

You will ensure the museum's resources are managed effectively to ensure its long-term sustainability. You will set and monitor the annual budget as directed by the trustees, ensuring good

financial systems and processes are in place to support the effective management of resources and monitoring of financial performance. You will lead work on developing the museum's income streams, including identifying new opportunities (e.g. grants, fundraising, legacy giving, commercial hire) and putting in place audience research to inform decision making.

### *Digital and marketing*

You will lead the museum's digital and marketing strategy, helping to develop its digital and marketing presence to increase visitor and community engagement. You will act as a key ambassador for the museum with our military, regimental, local and visitor communities, as well as with key stakeholders such as the English Heritage Trust which manages Carlisle Castle where the museum is based. You will also develop and maintain relationships with funders, donors and other stakeholders to extend the impact of the museum and maximise commercial potential.

### *Working together*

You will maintain effective working relationships and communications with the Chair, Trustees, staff and volunteers, to ensure the skills and expertise of all individuals can be drawn on for the benefit of the museum. You will support the Trustees to ensure that the museum meets all legal and regulatory responsibilities, by providing accurate financial and performance information and reports to the Board to enable robust decision making, and by maintaining effective risk management processes to evaluate, monitor and mitigate risks for the charity.

This list of responsibilities is indicative only and you may be expected to perform other duties as are reasonably commensurate with the role.

*Scale and scope of the role*

<b>Reports to</b>	Board of Trustees
<b>Line management</b>	Chair of trustees
<b>Financial responsibility</b>	Operating budget of circa £150k
<b>Key relationships</b>	With the board of trustees; The Duke of Lancaster's Regiment including veterans of antecedents; the wider military community; local and regional education and community groups
<b>Working hours</b>	37.5 hour working week with some weekend and evening working required
<b>Salary and benefits</b>	£27K with 25 days leave

## Museum Manager person specification

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Essential	Desirable
<b>Experience and knowledge</b>	
Experience of the museum sector	An interest in, knowledge and understanding of the military
Leadership and management of a team	Engaging with the education sector
Developing strategy and operational planning	Commercial Awareness
Managing a budget	Knowledge of marketing
Familiarity and competence with office IT	Managing digital opportunities in the sector including widening access
Income generation and Fund-raising	Volunteer management
	Charity governance
	Writing articles and communicating research
	Handling enquiries
	Managing a collection
<b>Skills and attributes</b>	
You will have the ability to roll your sleeves up and get involved with operational matters, whilst retaining a strategic perspective.	
You will have strong leadership and management skills, with the ability to bring out the best in staff and volunteers.	
You will have excellent communication and relationship management skills, with the credibility to represent the museum with influence and authority.	
You will be curious minded and have a strong interest in artefacts and collections as a valuable asset which you are able to communicate to all audiences	
You will have an interest in the military, its contribution and connection to society and be able to take a full part in supporting the wider military community	
You will understand the need to generate income with the ability to think commercially and identify additional revenue opportunities	

### Other requirements

Role is subject to a DBS check

A driving license is helpful to reach more remote areas in our catchment



CUMBRIA'S  
MUSEUM OF  
MILITARY LIFE

## **Forward Plan 2019 - 2022**

## SUMMARY OF THE PLAN

The Alma Project transformed the King's Own Royal Border Regiment Museum, recognised in the rebranding. The transformation was significant and saw the Museum remodel itself both in terms of the display, range of exhibitions and Learning and Outreach. It has taken some time to bed in and understand the scale of the change. Three things are clear. First the transformed museum offers significant benefit – this is set out in our statement of purpose, revised and updated in this plan. Second that supporting this new business model requires a different approach to managing the museum. Third the process of transforming the Museum left us with no financial reserve, and although we have been able to meet our running costs our operating model still faces risks of reduction of support from the MoD and the unpredictable tourist market.

These three things underpin this plan – we have a great offer, we need to sustain it and that means adjusting our management approach and regaining our financial sustainability. The plan follows Arts Council England guidelines, setting out:

- Section A. What we are.
- Section B. Where we think we are – a synopsis of the analysis and consultation which informed writing this plan, and a performance review of our last plan which is the platform from which we are building.
- Section C. A review of our purpose, or why we exist. This includes confirming our mission, stating the values we share and setting out our vision for where we would like to be in three years' time.
- Section D. There are risks we have to manage to both our mission and vision, these are set out together with measures we will take to mitigate the impact and reduce the likelihood.
- Section E. The mission and vision are underpinned by our aims (which describe things we intend to achieve) each of which is supported by several SMART objectives which describe how we will achieve our aims. Our priority aims are those which we will focus most effort. These priorities emerge from the analysis described in Section B and the risks in Section D.
- Section F. In this last section we describe the resources we have to deliver our vision, and how we intend to adjust and expand our resources in order to deliver the vision.

**Forward plan for Cumbria's Museum of Military Life**  
**January 2019 – December 2022**

**A. BACKGROUND TO THE PLAN**

A. 1. The King's Own Royal Border Regiment Museum Fund is an unincorporated association and is constituted by Deed of Trust and is a registered charity, No. 271943. The Museum Fund is constituted by a Deed of Trust dated 8 May 1976.

Following the completion of the relocation of the Museum to Alma Block, the working/operating title of the Museum is 'Cumbria's Museum of Military Life'. (CMoML).

A.2. The Museum is for the benefit of all visitors. This includes present and former members of the Regiment and their families, the residents of Cumbria and North West England, schools and educational groups of all ages, visitors to the area and other interested organisations.

A.3. The Museum is based in Carlisle Castle, a scheduled ancient monument which houses the former barrack buildings of the Border Regiment's Depot. In 2014, it relocated to Alma Block (a Grade II listed building) in the outer ward of the Castle, as part of a major project supported by the Heritage Lottery Fund.

A.4. The Museum building is occupied under the terms of a lease held by the Museum Trustees from Historic England/English Heritage, who manage Carlisle Castle as a visitor attraction and as a monument in care. The links with the Regiment and the Army continue at the Castle with the presence of The County Headquarters of The Duke of Lancaster's Regiment, a unit of the Regiment's Reserve Battalion and the HQ of Cumbria Army Cadet Force.

A.5. The Alma ground floor exhibition space is 278 square metres and there is a first floor temporary exhibition space of 80 square metres the museum has run 2 funded exhibitions per year since the move from Queen Mary's tower. The space can be split to provide a lecture room, and also used to run events. The collections consist of: 2000 books and Journals; Objects c. 15,000; Archives and documents c. 6000; Photographs and images including negatives c. 60,000. These items relate to the current Duke of Lancaster's Regiment and its forebears back into the 18<sup>th</sup> Century. In addition access to the collection is provided through research facilities and online virtual tour access (<https://www.cumbriasmuseumofmilitarylife.org/museum/virtual-tour/>) together with a full programme of over 200 outreach events both at the Museum and across the region (latest list enclosed as Annex A).

## **B. ANALYSIS AND CONSULTATION WHICH INFORMED THIS PLAN**

### **B.1 Situation review**

- Political. At the time of writing national politics is dominated by BREXIT. The effects of BREXIT on the economy and society of the NW Region are unknowable at this stage. There is a governmental initiative to energise the north England/South Scotland region called the Borderlands Initiative. This is now awaiting final approval by the Government but is drowned out by BREXIT. Should Borderlands be endorsed it is likely that there will be a programme around Carlisle and therefore the possibility of being a partner in such a programme/project to raise the profile and attractiveness of the Museum.
- Economic. The economy of the North West remains relatively flat, Carlisle City centre has been hit by some of the woes experienced by many other regional centres as large businesses (eg House of Fraser) struggle to cope with the new trading conditions. However, the economy of Carlisle remains relatively strong.
- Social. The strong and continuing interest in history and genealogy continues, given further impetus by WW1 commemorations, which have helped the Museum's profile.
- Technological, the ubiquity of mobile communications and the rapid pace of change continue. This presents some opportunities for the museum in terms of digital engagement to broaden the use of the collection; retail activities, and outreach.

- Legal. There have been impacts on the Museum as a result of further legal restrictions on Firearms and control of substances hazardous to health. These have been manageable. The biggest change for the Museum has been the new status of English Heritage and its split from Historic England. This has added to delays over signing our lease. In time it may enable EH to do more in and with Carlisle Castle, this has yet to be manifested.
- *Environmental. The museum team is conscious of the need to be environmentally responsible and works hard to reduce impact within the constraints of being housed in a listed building. This includes efforts to manage waste to the minimum, recycle where possible and use digital means as much as feasible.*
- Military. With the declining footprint of the Army in the region, the Museum's profile has grown due to its work with both Regimental and the wider military community. In return for the financial support from the Ministry of Defence, there is a requirement to support both our local Regiment and Armed Forces as a whole.

## **B.2 The Alma Project**

The forward plan this document replaces is the Alma Project plan. The key aims of that plan were to:

- Move the Museum within Carlisle Castle
- Establish a learning and outreach programme
- Re-display the collection, making it more accessible to the public
- Broaden access to the collection

We assess our success in achieving these key aims through a variety of data (example Annex C) including:

Visitor numbers. Immediately after the museum move and associated period of closure our visitor numbers dipped calamitously. We addressed this and visitor numbers are back close to the pre-move figure. The key changes have been that paying to enter our museum is separate to Castle entry fee, a very effective joint ticket has been introduced (March 2016) and in a reciprocal arrangement, we allow English heritage Members in free. The number of paying visitors has

increased as a percentage of the total number of visitors to the Castle since the move but we acknowledge there is further to go.

Visitor feedback. Our visitor feedback has been almost universally positive. A leading indicator is our score on Trip Advisor. Over the period of the Alma project our ranking within local attractions has risen from 12 to 4<sup>th</sup> and our review score 70% excellent, 24% Very good and 6% average (of 142 reviews). In addition, approximately 20% of reviews of English Heritage at Carlisle Castle recommend the military museum and these tend towards the better reviews. Visitor comments books for each of the major temporary exhibitions for the last three years have given positive feedback.

Learning and Outreach Engagement. Assiduous hard work by the staff team has led to a significant expansion of the learning and outreach programme a key part of the HLF supported bid. The museum now supports over 200 activities annually (See Annex A), both in the Museum, locally and across the region. The range of audiences has also been expanded including educational establishments in spite of changes to the National Curriculum which have reduced the interest in outreach generally by schools.

Exhibition programme and Grant funding. The Museum has attracted grant funding in each of the last three years to support our exhibition programme. This programme has deliberately taken a broad view of military history to attract a more diverse audience. Themes included remembrance, women and the military, the military and India.

### **B.3 RESIDUAL CHALLENGES**

Realising the Alma project has presented the Museum with some challenges. There are two main challenges:

First gaining sufficient income to resource the staff team required to manage the broader offer the Museum now provides. The Museum team is on average 5 FTE including part time and contract support. The current annual incoming resources including grants cover this but we need to increase our non-grant income to achieve a long term sustainable position

Second the Museum spent its reserves during the project and needs to reconstitute a reserve fund.

This new forward plan acknowledges the requirement to increase income in order to achieve sustainability without grants and build resilience. This is intended to fund the general operational costs of the Museum, but external grant support will continue to be sought for exhibitions and other programmes of work.

## **B.4 Workshop and SWOT**

B.1 The Museum Team carried out a Forward Planning Workshop in December 2018. The document is enclosed. The core of the analysis which lead to the purpose aims and objectives set out in this plan was the SWOT analysis. The successful Alma project created a Museum with a significantly different operating model. We have identified a range of strengths weaknesses opportunities and threats (page 7-9 of the report at Enclosure 1). The key elements being:

### **Strengths**

- Our people (in particular permanent staff)
- The collection, location and facilities;
- A successful exhibition programme and learning and outreach attracting grant support

### **Weaknesses:**

- Staff overstretched to achieve the range of tasks facing them

- Commercial offering
- Digital offering

**Opportunities:**

- Commercial opportunities which have yet to be fully exploited
- Changing working practises to be more efficient
- Digital offering

**Threats:**

- Curator succession
- Pressure on staff time
- Declining financial support from MoD/Regiment
- Lack of reserve

## **C. STATEMENT OF PURPOSE WHICH DRIVES OUR PLAN**

**C.1 Our mission:** Through diligent stewardship of its collections, CMOML tells the story of ordinary people doing extraordinary things, enriching people's lives in our local, regional, international specialist and military communities of interest.

**C.2. Our Core Values,** as Trustees, Staff, Volunteers and Friends we share these values for the Museum:

- **People** – our visitors, donors, military community and local and regional community are why we exist – to enrich their lives
- **Stewardship** – we are the current custodians of the collection, we value it for now and the future, and we endeavour to ensure it is cared for to the best possible standard so that it remains available to fulfil our mission
- **Learning** – we value learning ourselves and continually seek to enhance our knowledge, and also try to help others learn in formal and informal settings.

- **Curiosity** – We take a strong interest in our collection and enhancing it, and the communities we serve - we want to know more about them, this underpins our learning and helps us to create exhibitions and events which stimulate curiosity in others to enable them to understand the meaning and relevance of the military experience.

**C.3. Our underpinning values:** As people we will behave with

- Integrity and accountability
- Commitment and loyalty to the Museum and
- We will serve our community with respect for each other and all of our visitors

**C.4. Our vision:**

By sharing a locally and regionally renowned collection of military history the museum becomes:

- Hub of vibrant communities of interest
- A focal point for visitors to Carlisle and Cumbria.
- A strong support to the military community, with a focus on the current and antecedent regiments

**C.5. Our Stakeholders**

Our stakeholders are:

- Our Trustees staff friends and volunteers who have invested in the success of the Museum and embody its purpose.

- The Duke of Lancaster's Regiment, including those serving and veterans and their families, and associated organisations including cadets. They support us with time and donations and who we support with events, facilities and keeping alive their shared heritage.
- The Ministry of Defence and in particular the Army and its associated organisations, who support us with resources and who we support by promoting the Army
- English Heritage and Historic England who are our partners and landlords
- Heritage Lottery Fund
- Carlisle City Council
- Local Schools, the University of Cumbria and other colleges
- Our business partners including John Watts Coffee
- Our visitors and those who attend our events

#### **D. RISKS WHICH INFORM OUR PRIORITY AIMS**

Our risk register was first created alongside the Alma project plan. It has been kept under constant review and revised in the light of the Forward Plan workshop SWOT analysis. It is shown at Annex B. The main impacts which our actions set out in our aims and objectives are intended to address are:

- Reduced financial sustainability (Risk 3, 4)
- Management and staff structure (Risk 11)
- Key staff moves (Risk 9)
- Brand awareness and impact decline (Risk 5,6)

#### **E. AIMS AND OBJECTIVES WHICH WILL DELIVER OUR VISION**

**Our aims for the next five years are to:**

##### **1. Continue to provide a broad and varied engagement programme**

2. Continue to manage and care for the Museum Collections
3. Continue to provide high quality user services
4. Become resilient and sustainable – PRIORITY AIM
5. Develop the capability of the Board of Trustees, staff and volunteers
6. Enhance our digital presence – PRIORITY AIM

Ser	Objective	Timeframe	Lead	Resource	Success Criteria
1	<b>AIM 1: Provide a broad and varied engagement programme</b>				
1.1	Maintain yearly temporary exhibition programme	<ul style="list-style-type: none"> <li>Annual</li> </ul>	LAO	External funding <i>(20k per annum previous years)</i>	<ul style="list-style-type: none"> <li>Installation two temporary exhibitions per year</li> </ul>
1.2	Sustain education service to schools and colleges	<ul style="list-style-type: none"> <li>Annual</li> <li>2020</li> <li>2021</li> </ul>	LAO	Core budget and donations from schools	<ul style="list-style-type: none"> <li>Promote offer to all County schools annually</li> <li>Develop literacy resource and trial with two primary schools</li> <li>Obtain Learning Outside the Classroom quality badge</li> </ul>
1.3	Strengthen links with the Regimental family and wider military community	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Annual</li> <li>Ongoing</li> <li>2019</li> </ul>	All	Core budget and staff time	<ul style="list-style-type: none"> <li>Attend four Association meetings per year</li> <li>Submit articles to Kingsman magazine/newsletter</li> <li>Sustain monthly veterans' lunch programme &amp; investigate funding options</li> <li>Work with veterans on bespoke Afghanistan project</li> </ul>

Ser	Objective	Timeframe	Lead	Resource	Success Criteria
1.4	Provide a family friendly experience and community engagement	<ul style="list-style-type: none"> <li>• Annual</li> <li>• 2019</li> <li>• 2019</li> <li>• 2021</li> </ul>	LAO	Grant of £20k and core budget	<ul style="list-style-type: none"> <li>• Sustain family holiday workshops and talks programme</li> <li>• Provide satellite displays around County to support Afghan project</li> <li>• Audit family friendly provision against kids in Museums manifesto</li> <li>• Install a family friendly exhibition &amp; provide supporting events programme</li> </ul>
<b>2</b>	<b>AIM 2: Manage and care for Museum Collections</b>				
2.1	Ensure MODES cataloguing programme is Spectrum compliant	<ul style="list-style-type: none"> <li>• 2019/20</li> <li>• Annual</li> </ul>	MusA sst	Staff and volunteer time	<ul style="list-style-type: none"> <li>• Complete MODES Inventory and ensure compliance with Spectrum 5 specifications</li> <li>• Complete process for backlog and future acquisitions</li> </ul>
2.2	Acquisitions and collections policy	<ul style="list-style-type: none"> <li>• Annual</li> </ul>	Curat or & staff	<i>Staff time</i>	<ul style="list-style-type: none"> <li>• Review policy</li> <li>• Maintain year on year accessions</li> <li>• Input directly onto MODES</li> </ul>
2.3	Museum Accreditation	<ul style="list-style-type: none"> <li>• 2019</li> </ul>	Curat or	Staff time	<ul style="list-style-type: none"> <li>• Retain ACE accreditation</li> </ul>
2.5	Conservation and preservation	<ul style="list-style-type: none"> <li>• 2019</li> <li>• Ongoing</li> <li>• Annual</li> </ul>	Curat or & MusA sst	Grant funds	<ul style="list-style-type: none"> <li>• Repair Bowls painting</li> <li>• Maintain correct environmental conditions in Museum and stores</li> <li>• Review and ensure efficient storage of all collections</li> </ul>
2.6	Collections documentation assessment	<ul style="list-style-type: none"> <li>• Jul –Dec 2019</li> <li>• Annual</li> </ul>		Curator and volunteer time	<ul style="list-style-type: none"> <li>• Realistic documentation plan to tackle backlog</li> <li>• Policies &amp; working practices in place to manage Museum documentation</li> </ul>

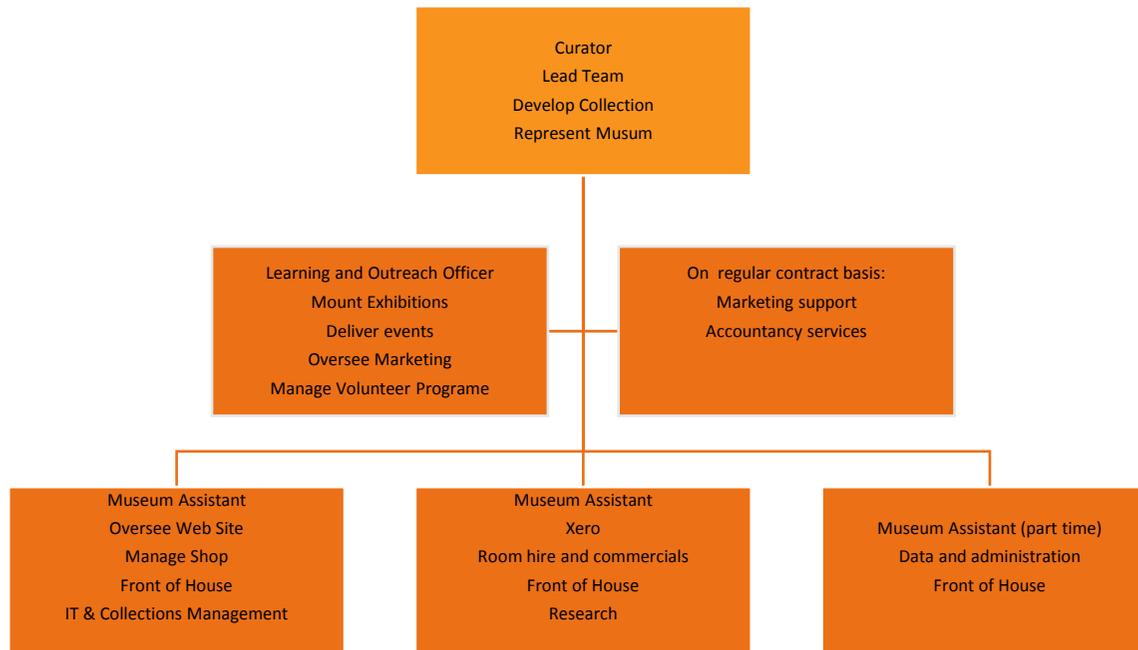
Ser	Objective	Timeframe	Lead	Resource	Success Criteria
2.7	MODES training for staff and volunteers	<ul style="list-style-type: none"> <li>Annual</li> </ul>	MusA sst	£250 (MODES trainer)	<ul style="list-style-type: none"> <li>Staff and volunteers have confidence and ability to use Modes</li> </ul>
<b>3</b>	<b>AIM 3: Provide High Quality User services</b>				
3.1	Provide high quality customer service	<ul style="list-style-type: none"> <li>2019</li> <li>ongoing</li> <li>2020</li> </ul>	MusA sst		<ul style="list-style-type: none"> <li>Use VAQAS format to evaluate service to visitors</li> <li>Provide refresher training for staff/volunteers on front desk duties</li> <li>Welcome Host training for staff and volunteers</li> </ul>
3.2	Health & Safety	<ul style="list-style-type: none"> <li>Mar 2019</li> <li>Apr 2019</li> <li>Ongoing</li> </ul>	Curat or		<ul style="list-style-type: none"> <li>Review health &amp; safety policy</li> <li>Introduce risk assessment training for staff</li> <li>Staff to attend relevant training to comply with H&amp;S requirements</li> </ul>
3.3	Ensure high standard of facilities	<ul style="list-style-type: none"> <li>Annual</li> <li>Apr 2019</li> </ul>	All staff  MusA sst		<ul style="list-style-type: none"> <li>Hold volunteer maintenance days</li> <li>Introduce Museum check list and programme of inspection</li> </ul>
3.4	Audience awareness	<ul style="list-style-type: none"> <li>2019</li> <li>Jan 2020</li> </ul>	Curat or		<ul style="list-style-type: none"> <li>Undertake research into users of Museum service</li> <li>Write audience development plan</li> </ul>
<b>4</b>	<b>AIM 4: Be Resilient and Sustainable</b>				
4.1	Income generation	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Ongoing</li> <li>Ongoing</li> <li>2020</li> </ul>	All   Trust ees	Fundraising audit complete (Enclosure 3)  Staff training 2k	<ul style="list-style-type: none"> <li>Monitor Key performance indicators (see data table Annex C)</li> <li>Promote venue hire</li> <li>Review retail usage through shop and website</li> <li>Maintain talks and outreach programme</li> <li>Investigate alternative &amp; sustainable means of generating income inc fundraising</li> </ul>

Ser	Objective	Timeframe	Lead	Resource	Success Criteria
4.2	Brand awareness, Marketing & Promotion	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Ongoing</li> </ul>	Trustees, staff & vols		<ul style="list-style-type: none"> <li>Ensure use of brand on Museum website, social media and all publicity materials &amp; through displays, exhibitions, services we provide</li> <li>Ensure high quality marketing &amp; promotion through printed and electronic media</li> </ul>
4.3	Strengthen Partnerships – with English Heritage, other Museums, the Ministry of Defence and organisations within the county	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Mar 2019</li> <li>Ongoing</li> </ul>	Trustees & staff	Staff and trustee time	<ul style="list-style-type: none"> <li>Attend Cumbrian Museums Directors Group meetings regularly</li> <li>Regularly liaise with English Heritage to promote the site as a whole</li> <li>Attend Northern Military Museums Forum, Army Museums Ogilby Trust conference and other relevant meetings</li> </ul>
<b>5</b>	<b>AIM 5: Develop the Trust, staff and volunteers</b>				
5.1	Implement 'Transfer the Colours' - Curator succession & development plan	<ul style="list-style-type: none"> <li>2019</li> </ul>	Trustees	Staff time	<ul style="list-style-type: none"> <li>Separate document re Curator's retirement</li> <li>Review staff organisation and structure</li> </ul>
5.2	Evaluate Museum Trust	<ul style="list-style-type: none"> <li>Jun 2019</li> <li>Jan 2020</li> <li>Jun 2020</li> </ul>	Trustees	tbc	<ul style="list-style-type: none"> <li>Undertake skills audit of Museum Trust</li> <li>Introduce Trustee using Gov.Uk Charity Commission material</li> <li>Recruit two new Trustees</li> </ul>
5.3	Develop volunteer programme	<ul style="list-style-type: none"> <li>Jun 2019</li> <li>Annual</li> <li>Jun 2020</li> <li></li> </ul>	LAO	Staff time	<ul style="list-style-type: none"> <li>Establish volunteer newsletter</li> <li>Provide yearly volunteer thank you event</li> <li>Recruit 2 front of house volunteers</li> <li>Establish training for volunteers</li> <li>Recruit volunteer to co-ordinate programme</li> </ul>

Ser	Objective	Timeframe	Lead	Resource	Success Criteria
5.4	Introduction of staff appraisals	<ul style="list-style-type: none"> <li>Dec 2019</li> <li>2020</li> </ul>	Trustees & Curator	Staff time Trustee support	<ul style="list-style-type: none"> <li>Introduce in-house training and support for implementation of appraisals</li> <li>Appraisal scheme is implemented</li> </ul>
<b>6</b>	<b>AIM 6: Enhance our Digital presence</b>				
6.1	Increase social media engagement	<ul style="list-style-type: none"> <li>Jun 2019</li> <li>Jan 2020</li> <li>2021</li> </ul>	MusA sst	Staff time and training tbc	<ul style="list-style-type: none"> <li>Produce a Museum social media policy and plan</li> <li>Recruit social media volunteer</li> <li>Provide in-house training on social media</li> </ul>
6.2	Increase Web Site engagement	<ul style="list-style-type: none"> <li>Ongoing</li> <li>Mar 2019</li> <li>Jun 2019</li> <li>Jun 2020</li> <li>Dec 2022</li> </ul>	MusA sst	Friends grant of 3k	<ul style="list-style-type: none"> <li>Review website usage</li> <li>Undertake non-user consultation</li> <li>Produce three year plan on future website development</li> <li>Mount virtual exhibition</li> <li>Introduce on-line photographic catalogue</li> </ul>

## F. RESOURCES WHICH WILL SUPPORT DELIVERING OUR VISION

### F.1 Current Permanent Staffing Structure



**F.2 Friends Support:** Active Friends Group of 150 members, which produces a Newsletter three times a year and six lectures/events for members. A number of Friends volunteer at the Museum.

**F.3 Volunteer Programme:** 23 regular volunteers providing 212 days (2018) including:

- Collections Cataloguing
- Front of House
- Exhibition Support
- Collections Care
- Collections Digitisation
- Events and Workshops

**F.4 Trustees Organisation:** 12 including Curator

- Chair
- Finance (vacant with nominee)
- Legal -
- HR (Vacant)
- Regiment (ex officio)
- Local Government
- Local Army Reserves (ex Officio)
- Marketing
- Local business and friends
- Tourism advice
- Education (vacant)

**F.5 Finances**

**F.5.1 Full Budgets.** Detailed budget forecast are enclosed as Annex D.

**F.5.2 Summary Forecast:**

Year	18-19 Forecast	19-20 Budget	20-21 Budget	21-22 Budget
Total income	£122,127.52	£130,796.02	£130,212.19	£138,217.80
Total expenditure	£130,034.16	£125,928.54	£123,115.09	£124,240.49
Profit /Loss	-£7,906.64	£4,867.47	£7,097.09	£13,977.31
Accumulated Profit	-£7,906.64	-£3,039.16	£4,057.93	£18,035.24

This financial plan shows an overall increase in income of £16, 000 (12%) and reduction of expenditure of £6000 (6%) over three years. Overall this represents a move into profitability. The budget is divided into the following key areas:

**F.5.2.1 Admissions** – we intend to generate an increase of £19k in admissions, achieved by an increase in visitors and events that attract a paying audience. This will be driven by enhanced marketing, better events including partnership events, and an overall increase of visitors to Carlisle driven by the Borderlands initiative.

**F.5.2.1 Retail.** Continuous improvement of management of the shop, developing our room hire, expanding our range of paid for events and creating an online offer will aim to increase retail income by £5k.

**F.5.2.3** Alongside this we will maintain our charging regime for learning and outreach which covers our costs in delivering this core activity and continue to apply for grants to mount exhibitions which enhance our reputation and footfall thus increasing income.

**F.5.2.4 Cost control** -We will monitor and aim to reduce costs in all areas where possible. The Museum has adopted the XERO financial management software programme to manage income and expenditure budgets efficiently and support better budget and financial management and planning.

## **G. Review.**

**G.1 Main Plan.** Our purpose will be our guiding light for the period of this plan. We will measure our performance against it, though we will constantly refer to it we do not intend to change the purpose and will review at the next full Forward Plan review in 2022.

**G.2 Risks.** The risks are reviewed quarterly at each trustees meeting.

**G.3 Performance Monitoring.** Performance against our objectives, including visitor reviews, visitor numbers, financial performance will be reviewed by the museum team monthly (available to trustees for comment) and by trustees quarterly. The exception being the financial performance which will be reviewed monthly by the finance sub-committee (Chair, Mike Diss, Curator).

Date approved by Trustees 25 Jan 19

Signed and dated by the Chair of Trustees Andrew Dennis 25 Jan 19