



Strategic Business Plan 2020 – 2022

Index

Item	Page No.
Executive Summary	1
Context	2-3
Strategic direction	3-4
Income and expenditure	5
Risk analysis	6

1. Executive summary

The South West Fed is highly valued for being longstanding and fulfilling its purpose successfully but many members continue their support due to that historic appreciation rather than receipt of current member benefits. The main challenges we face are:

- A sustainable operation after the impact of Covid-19 on activity and membership;
- Capacity to deliver with no reserves, core funding or board capacity;
- Focusing of activity to ensure income and expenditure are managed and sustainable.

This business plan seeks to address these challenges by outlining the impact of Covid-19, identifying core work that can be delivered and providing a direction towards a sustainable future.

Growth is not currently an appropriate direction due to the impact of Covid-19 on practical activity and the reduced financial position of our sector that will impact on membership. We are focussed on diversifying our activity, building partnerships and managing costs to ensure we are in a position to thrive as the sector recovers in the long term.

2. The Context

2.1. Covid-19

In March 2020 the Covid-19 crisis forced the country into lockdown. Museums closed, staff were furloughed and for the Fed, our conference had to be postponed and moved to an online event, our forums cancelled and our meetings moved to a digital platform.

The conference is our main source of income and this was significantly reduced while costs remain constant. We were successful in achieving an ACE grant which ensured our survival into the autumn of 2020.

With the social distancing guidelines anticipated to be in place for many months, maybe years, we are having to plan for our main conference and forums to remain digital events for the foreseeable future, which will see a reduction in our income that means we cannot cover our costs.

Membership income remains highly vulnerable and the ongoing loss of income and jobs across the sector requires us to be realistic about membership income for the next few years.

2.2 Situation analysis

The SW Fed is valued for networking, communications and advocacy.

Individual membership is seen as fulfilling a need for staff at small museums, museum volunteers and freelancers who benefit from the networking. However, in the current climate we recognise that many individual circumstances will change and need to monitor this during the 2020 renewal windows and beyond.

Similarly, institutional membership has remained steady with many long-term supporters. The impact of Covid-19 will force many to reduce budgets and we recognise that, particularly for smaller museum who form the majority of our institutional memberships, we may become an unaffordable expense.

In addition, during this turbulent period the sector has been considering its role in relation to two significant themes;

- Climate emergency
- The Black Lives Matter movement

2.3 Competitor analysis

The SW Fed is still positioned against competitors as high-quality and low-price, yet small.

The closest competitors are the Museums Association and Association of Independent Museums (AIM), British Association for the Friends of Museums (BAfM), Association for Cultural Enterprises and the National Museum Directors' Council (NMDC).

Comparators are other Federations that are in contrasting positions in terms of activity, funding and capacity. Many offer similar pricing structures and remits but some provide free membership and few have paid support for services with most relying on voluntary board to deliver core work.

The Museums Association (MA) is a professional body, targeting individuals for AMA status. It is perceived as expensive and as providing little at local level.

Association of Independent Museums (AIM) is the national UK body connecting, supporting and representing independent museums.

British Association of Friends of Museums (BAfM) is a network for friends, volunteers and supporters of museums, galleries and heritage sites.

For commercial staff in museums: the Association for Cultural Enterprises promotes commercial best practice in the cultural, heritage and visitor attraction sector by providing training and networking opportunities and facilitating the sharing of information and experience among its members.

For senior museum staff: NMDC provides its membership with a forum for discussion and debate, and an opportunity to share information and work collaboratively.

For museum educationalists: the Group for Education in Museums (GEM) provides sector support and training.

For particular areas of collections expertise and curatorial support there are subject specialist networks. Examples are the Society of Museum Archaeologists, British Aviation Preservation Council, the Contemporary Art Society, the Society of Decorative Art Curators and the Dress and Textile Specialists.

Most membership organisations are offering extended membership terms or reduced prices to help as the sector recovers from Covid-19.

3. Strategic direction

3.1 Vision and Mission

Vision: A flourishing and confident heritage community in the South West

Mission: Creating opportunities to connect and inspire the heritage community across the South West, for the benefit of organisations and their audiences.

3.2 Aspirations

- To promote a culture of shared learning across the region by connecting members with each other, with relevant partners, and with the wider sector.
- For members to develop skills from our events and by being directed to other CPD opportunities in the region and beyond.
- For resources and information provided through our website, eBulletins, newsletters and social media to give members and others in the sector guidance, ideas, advice and the latest news.
- To champion the value and benefits of the South West's museums, art galleries and heritage sites.

3.3 Membership

Currently members joining the SW Fed get access to networking events, newsletters, website, advocacy support and free entry to participating museums. The latter is no longer appropriate due to the need to support museums with admissions income and many of these benefits are also available to non-members.

In addition to benefitting from staff development, institutional members are also featured on the SW Fed's homepage and in spotlight features, as well as in the e-newsletter, given website links, and receive several cards for free admission of staff.

Corporate members have their details and website links on the suppliers' page of the SW Fed website and have the opportunity for stands at the conference exhibition.

Members tend to be young professionals, students, freelancers, mid-career, from small museums, approx two-thirds female to one-third male, from a curatorial background, loyal, earnest and intellectual. New student and freelancer rates are planned, to support those groups and encourage a more diverse membership.

Whilst the website facilitates membership comms and resources and enables renewals, it is recognised as a significant core cost that needs to be reviewed due to current income challenges.

Given the changes within the sector, the Fed will move to being a 'free to join' organisation and remove its significant costs, which requires:

- Closure of our paid for website and a move to a free to use platform, made possible due to the removal of membership payments
- Increased use of our social media pages to promote news and jobs
- Ceasing large scale activity including the conference and fora
- Running a new programme of 'pay as you go' monthly online sessions that will provide opportunities for sharing best practice, engaging with regional and national issues relevant to the sector and networking with colleagues (you have to be a member to attend, but membership is free)
- Reshaping board roles:
 - o Removing the Secretaries for Fora and Conference
 - o Removing the County Representative role to give the board control over its membership and ensure a diverse range of officers who can support the new programme beyond the field of museums
 - o Creating new Creative Programme Officers, who will work with a small number of board members to agree the content for monthly online session. They will have at least two areas of specialism and we retain our ambition for a wide geographical spread of post holders, across the region.
 - o Revising the Vice Chair role to lead the creative programme
- It is important to consider the impact on board workload if costs have to be reduced. It may be necessary to create more active roles to support free and corporate membership and communications and this will be under constant review.

3.4 New income sources

Due to recognised limits of membership growth, income is focussed on the new 'pay as you go' sessions to cover basic costs on our online tool for delivering regular sessions, as well as a better understanding of sector grants. We are working closely with ACE to understand the potential of future funding support to enable activity for members.

In addition, we continue to explore the potential of legacies, corporate sponsorship and partnership with organisations such as SWMDP and regional universities.

4. Costs and Revenue estimates and projections

Activity - Income	£ per anum 2020	£ per anum 2021	£ per anum 2022
Membership	£4,389	£0	£0
Conference	£1,000	£0	£0
Digital content sales	£120	£500	£750
Sponsorship/Corporate membership	£500	£500	£500
Legacies	£0	£0	£0
Grants	£12,730	£0	£0
TOTAL	£18,739	£1,000	£1,250
Activity - Expenditure	£ per anum 2020	£ per anum 2021	£ per anum 2022
Development Officer costs	-£8,400	£0	£0
Membership offer and launch	-£500	£0	£0
County group review and delivery	£0	£0	£0
Conference review and delivery	-£3,000	£0	£0
Forum review and delivery	£0	£0	£0
Corporate/sponsorship review	£0	£0	£0
Communications delivery	£0	£0	£0
Peer sessions	£0	£0	£0
Board meetings	£0	£0	£0
Online content creation/sale	£0	£0	£0
Online content sharing and PR	£0	£0	£0
Legacy programme	£0	£0	-£350
ACE funding review	£0	£0	£0
Management accounts and review	£0	£0	£0
Funding monitoring and applications	£0	£0	£0
Website	-£2,300	£0	£0
Online platform	-£350	-£350	-£350
Operating costs (insurance, etc)	-£50	-£50	-£50
TOTAL	-£14,600	-£400	-£750
TOTAL	£4,139	£600	£500

6. Risk Analysis of the Business Plan

Risk	Impact	Probability	Risk	Mitigation	Contingency
Loss of membership income	High	High	Severe	New free membership structure	Manage costs and activity to reflect income and capacity
Loss of conference income	High	High	Severe	Remove from activity plan	New programme of activity
Loss of board members	Medium	Medium	Medium	Regular meetings and comms	Build reputation across the sector to encourage recruitment
Failure to comply with transparent financial reporting	High	Low	Medium	Treasurer with strong financial background and regular board reviews of finance	Ensure effective recruitment if treasurer needs to be replaced, good training can be given by current post holder
Loss of Development Officer	High	Medium	High	New membership structure and programme to enable functionality without paid support	Use of grant to ensure smooth transition
Closure of website	High	Medium	High	New 'free to access' platform to remove costs and ensure capacity to update	Use of grant to ensure smooth transition
Lack of new funding	Medium	Medium	Medium	Ongoing comms with funders	Costs to be reduced have been identified, activity dependant on grants would not take place
Inability to hold board meetings/AGM	High	Low	Low	Purchase of zoom reduces risk for a year	Socially distanced model to be prepared for autumn 2021
Inability to deliver conference/forums	High	Low	Low	New programme steps away from this approach	Use of grant to ensure smooth transition
Lack of management of risk register	High	Low	Low	Risk register review to be added to board meeting agenda annually	Chair role profile to include this responsibility