

SOUTH HOLLAND INDUSTRIAL HERITAGE¹

Business Plan 2018-2023 (DRAFT)

Working together to preserve our heritage and traditional trades



January 2018

¹ South Holland Industrial Heritage is a collaboration between Moulton Mill, Chain Bridge Forge & Pinchbeck Pump Engine

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EXECUTIVE SUMMARY

In October 2017, the National Trust produced a detailed ‘SWOT’ analysis of each organisation’s current status, and highlighted opportunities for the three organisations to work collaboratively.

This business plan takes these opportunities and provides a detailed road-map for how the South Holland Industrial Heritage (SHIH) collaboration could work together more closely to *collectively*:

- Deliver a shared Vision by 2023;
- Sustain and grow their audiences;
- Develop a sustainable volunteering model; and,
- Implement a strategic and targeted communications and marketing strategy.

The plan also includes a fundraising strategy to support delivery of the above work-streams, a high level financial profile for the five years of the plan, a proposed approach to monitoring and review, and identifies key risks and how these could be mitigated. Each work-stream is supported by a range of appendices providing additional guidance and information.

In the first year, the emphasis is on getting a number of key things in place to build a solid platform for greater external facing collaborative working from Year 2 onwards. The more important work-streams for Year 1 include:

- Developing a more consistent visitor offer across the constituent parts of SHIH, informed by a peer review of each heritage attraction, enhancing existing visitor ‘components’ as appropriate;
- A decision by Welland and Deepings IDB on whether to commit to developing a volunteer offer for Pinchbeck Pump Engine, and on the assumption this is agreed, the three organisations to work together to create common volunteer systems and processes that will create a flexible, exciting, rewarding and mutually beneficial volunteering proposition;
- A decision by the IDB, informed by the above, on whether to extend the opening hours of the Pump Engine to include at least one day at weekends, which will help attract a larger and more diverse audience and build more consistency in the visitor offer across the three sites;
- Following an exercise to properly understand the true costs of volunteers, a decision on whether to pay reasonable volunteer expenses, which if taken forward should help attract a larger and broader demographic of volunteers;
- Developing a strategic and targeted approach to marketing and communications, including the creation of a collective SHIH brand and website that includes all three heritage sites, together with unified social media platforms that support that website. This should also include a fundraising page;
- Taking appropriate opportunities to secure external funding towards the changes proposed across SHIH;
- Ensuring each organisation within SHIH is General Data Protection Regulation (GDPR) compliant.

In Years 2-3, key work-streams include:

- To build on the more consistent visitor offer by exploring and then enacting opportunities for ‘programming’ that is cross-cutting, spread across the three heritage attractions and

targeted at your key audiences. This will create more reasons for regular visitors to return and help drive associated visitor spend;

- Having identified any gaps in volunteer roles, ensured new or refreshed role profiles are in place, and developed a considered recruitment plan, to launch a shared volunteer recruitment campaign under the umbrella of SHIH, employing the collective website as well other communication platforms and networks to spread the word;
- Developing SHIH wide marketing and communications and social media calendars to collectively plan and promote related activity.
- Collectively making the most of opportunities to promote SHIH and the three heritage attractions as part of celebratory days such as Lincolnshire Day and Open Heritage Days;
- Taking appropriate opportunities to secure external funding towards the changes proposed across SHIH.

Years 4-5 will be more about consolidating the achievements to date, and planning further improvements and enhancements across the collaboration as appropriate, including wider partnership working.

Overall there is good potential for you to work together for mutual benefit but it will take some resource, particularly time, trust and commitment. The core of this partnership working can be described as a ‘three legged stool’, comprised of audience development, volunteering and marketing/communications. Without all three ‘legs’ being attended to and strong, the partnership will not reach its full potential.

Taken as a whole, the business plan should help in fostering the collective financial and wider sustainability of each component part of the collaboration – Moulton Mill, Chain Bridge Forge and Pinchbeck Pump Engine².

² It should be noted that the client team has directed the National Trust to focus this business plan on the added value that collaborative working across and between the three organisations could bring, rather than the individual business development of each respective organisation. In the case of audience development however, more detailed analysis is provided on the visitor experience of each heritage attraction and how this could be enhanced, because this will be key for this work-stream, and will inform the collaborative approach to volunteering, marketing, etc.

1. Brief overview of the present context

Chain Bridge Forge, Moulton Mill and Pinchbeck Engine Museum lie in or close to the town of Spalding, south Lincolnshire.

All three are run by separate, independent organisations and present living, working, and participatory heritage attractions that showcase traditional skills, trades and machinery.

Since late 2016, the three managing organisations, namely the Friends of Chain Bridge Forge, Moulton Mill Project Limited, and the Welland and Deepings Internal Drainage Board (who own and manage Pinchbeck Pump Engine) have been working together to explore how to best collectively lead and deliver strategic change to meet a range of challenges, whilst improving resilience and building the sustainability of the organisations, and in turn improve and sustain the heritage assets for the long-term. This interesting and exciting collaboration is called South Holland Industrial Heritage (SHIH).

Each organisation within SHIH faces a range of similar challenges and issues including:

- Retaining and growing sufficient visitor numbers and other customers to drive income generation in a busy and competitive heritage market;
- Recruiting and retaining volunteers, including younger volunteers and new Trustees;
- Securing sufficient awareness of and support for the heritage attractions through quality marketing and communications;
- Financial sustainability i.e. bringing in sufficient income to cover core costs and maintain the heritage;
- Having sufficient capacity to explore and develop potential new business opportunities including business development, funding and developing long-term sustainability; and
- Keeping back office processes and associated costs to a minimum.

The following sections of the business plan set out how these challenges can be met through the SHIH collaboration.

2. Vision in 2023

South Holland Industrial Heritage Vision Statement

By 2023, South Holland Industrial Heritage is collectively seen as one of the key visitor destinations in South Holland, Lincolnshire.

As a cluster of heritage attractions (Chain Bridge Forge, Pinchbeck Pump Engine, and Moulton Windmill), we provide living, working, engaging and participatory experiences that conserve, celebrate and showcase how traditional agricultural industries shaped the land and people in the past, whilst sign-posting the relevance of that legacy today and into the future. Increasingly pertinent and high quality interpretation and presentation, is coupled with exciting and innovative programming that build connections between all three places, and delivers places for visitors to enjoy, learn and be inspired.

With more of a focus on the cultural and social history of these unique buildings we will have more to offer the general interest visitor and families. We will collectively become a regular visit with at least a half day dwell time that offers value for money and quality experiences. Visitor numbers will grow as we take advantage of the headroom within existing core audiences, and new ones start to be attracted.

Whilst each attraction is locally rooted in its community, by working collaboratively we provide a diverse range of opportunities for engagement through volunteering and participation. Volunteers continue to be the life-blood of each organisation, but a consistent and shared approach to promotion, recruitment, placement, and training creates a more sustainable and diverse volunteer demographic, a greater variety of roles, and volunteers who are happy, confident and skilled in the work they deliver, supported by staff and trustees with the right skills to help them thrive.

We will be places that matter to our local community, are valued, help fulfil local needs and improve the quality of life, and contribute to a sense of local pride.

Our shared approach to marketing and communications presents a unified voice to potential and returning visitors and other customers, and helps us to plan and promote a coherent, relevant and complimentary programme for visitors, and give them a richer experience. At the same time, collective sharing of audience insight, best practice, peer to peer review, and collaborative problem solving helps to deepen and strengthen partnership working between the three heritage attractions.

Ultimately, by working together we build greater mutual financial sustainability, sharing risks and benefits where appropriate, and take opportunities to secure additional resources, funding and other financial support as these arise. Furthermore, networking and emerging partnerships with other organisations, both locally and further afield, has increased awareness of South Holland Industrial Heritage, and begun to add value to the businesses.

3. Recommendations and action plans

For each work-stream, for example volunteering, an introductory narrative is provided, although in the case of audience development a more detailed analysis is provided because of the fundamental importance of this work-stream to the future success of SHIH. The narrative is then followed by a table of recommended actions prioritised chronologically over five financial years, starting 2018-19. In the case of the marketing and communications, and fund-raising strategies, excel spreadsheets has been produced. The actions are prioritised as follows:

- **Short-term** (Year 1);
- **Medium-term** (Years 2-3);
- **Longer-term** (Years 4-5).

An indication of the combined financial implications of the action plans and strategies is shown in Section 4.

3.1 Audience development and visitor experience

Overall, working in partnership will be beneficial to all three organisations in growing their audiences, strengthening their core product and building a changing offer across SHIH that will keep visitors coming back.

The three sites should aim to achieve steadily managed growth with modest year-on-year increases in visitor numbers driven by developing programming and the wider visitor offer. Co-ordinating opening days and times would help maximise this opportunity.

The three organisations are encouraged to work together through mutual support and peer review to continually improve the core offer across each attraction, and create a dynamic cross-cutting programme that does not put too heavy a burden on any one attraction or organisation.

The following narrative provides a detailed assessment of the existing audience and the potential for growth, and is followed by a discussion on how SHIH and its component parts can drive visitor growth through an excellent visitor offer.

3.1.1 The existing audience and potential for growth

a) Visitor numbers (2016)

Moulton Mill	20,000-25,000 (majority visiting the café only)	Open Thursday, Friday, Saturday, Sunday, Sun, 10am-4pm, all year round, and on Bank Holiday Monday's
Chain Bridge Forge	1,500-2,000	Winter: November to March – Wednesday & Friday 10am till 2pm, First Sunday in the month 11am till 3pm Summer: April to October – Wednesday & Friday 10am till 2pm, Every Sunday 11am till 3pm
Pinchbeck Pump Engine	446	Open Wed, Thurs, Fri; 11am-4pm; June to September only

b) Potential market size

Based on a 'Mosaic' analysis the resident population within a 40 minute drive time of Spalding is 381,785 households, and within a 30 minute drive time 110,369 households (refer to Appendix A1). Nationally benchmarked figures suggest that small pay-for-entry attractions similar to those in South Holland are likely to attract up to 1% of their 40 minute population i.e. some 13,118 households, equivalent to around 30,000 people (assuming households are 2.3 people in size on average). This suggests there is 'headroom' for SHIH to increase its audiences from the local area (refer to Appendix A2).

From that number, 14,187 households (within 30 mins) or 33,107 (within 40 mins) are considered to be 'in-fit'. This means they are the type of household that is likely to be interested in a heritage offer and would be expected to use some of their leisure time visiting cultural and heritage attractions.

	Households
In Fit	
City Prosperity	0
Country Living	6,374
Domestic Success	2,926
Prestige Positions	873
Rural Reality	3,982
Senior Security	32
TOTAL In Fit	14,187
Non Fit	
Aspiring Homemakers	5,682
Family Basics	3,357
Modest Traditions	2,006
Municipal Challenge	1,256
Rental Hubs	330
Rural Reality	16,108
Senior Security	8,357
Suburban Stability	4,889
Transient Renters	9,064
Urban Cohesion	2
Vintage Value	4,572
Total Non Fit	55,623

30 minutes' drive time

	Households
In Fit	
City Prosperity	39
Country Living	14,765
Domestic Success	7,250
Prestige Positions	2,889
Rural Reality	7,976
Senior Security	188
TOTAL In Fit	33,107
Non Fit	
Aspiring Homemakers	9,772
Family Basics	5,874
Modest Traditions	3,523
Municipal Challenge	1,973
Rental Hubs	1,293
Rural Reality	25,883
Senior Security	11,778
Suburban Stability	8,036
Transient Renters	13,141
Urban Cohesion	339
Vintage Value	6,784
Total Non Fit	88,396

40 minutes' drive time

Tourist markets are also to be welcomed, but should not be seen as a focus as the resource devoted to attracting them will not result in as many visits as concentrating on a more local market. This is because the overall draw in Spalding is insufficient – of the 7 local authority areas in Lincolnshire, South Holland is 6th in terms of tourism visitor numbers³, has the lowest tourism spend in the County, and is the least popular for holiday trips and over-night stays.

Overall, therefore we recommend that SHIH focus on the headroom within the in-fit local audience, rather than looking future afield or expending significant resources in trying to attract new audience groups as these groups are less likely to be a natural fit for the SHIH product and may require a significant change in the SHIH offer. The focus should be squarely on local, repeat visitors.

c) Getting to know your target market

Three groups stand out from the Mosaic analysis: The in-fit segment ‘Country Living’ is the largest group, with ‘Rural Reality’ second and ‘Domestic Success’ close behind, with both still offering a market worth pursuing.

Country Living:

- Country Living comprises well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.
- Country Living consists of affluent people who can afford to live in pleasant rural locations surrounded by agricultural landscapes. This population is divided between those still in work and retired people. <https://www.youtube.com/watch?v=KmIR3CwpXIM&feature=youtube>

C Country Living	C10	Wealthy Landowners	Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners
	C11	Rural Vogue	Country-loving families pursuing a rural idyll in comfortable village homes while commuting some distance to work
	C12	Scattered Homesteads	Older households appreciating rural calm in stand-alone houses within agricultural landscapes
	C13	Village Retirement	Retirees enjoying pleasant village locations with amenities to service their social and practical needs

³ https://www.visitengland.com/sites/default/files/east_midlands_2014_0.pdf

Rural reality:

- Rural Reality comprises people who live in rural communities and generally own their relatively low cost homes. Their moderate incomes come mostly from employment with local firms or from running their own small business.
- Rural Reality is a mix of families, mature couples and older singles living in rural locations in lower cost housing. Some live in developments that have sprung up around villages, others in scattered hamlets or in remote communities.

<https://www.youtube.com/watch?v=J1j-CHQQ2Cw>

D Rural Reality Success	D14	Satellite Settlers	Mature households living in expanding developments around larger villages with good transport links
	D15	Local focus	Rural families in affordable village homes who are reliant on the local economy for jobs
	D16	Outlying Seniors	Pensioners living in inexpensive housing in out of the way locations
	D17	Far-Flung Outposts	Mid-income families in remote areas with long travel times to larger towns

Interestingly, it is worth recognising that whilst Rural Reality is a single 'Mosaic' group, a part of this group is considered 'in-fit' and a part 'non-fit', with the latter being the largest 'non-fit' group. Whilst the latter are not a good fit for the National Trust (NT) under Mosaic analysis because of the NT's relatively high admission/membership charges, the cost of the SHIH offer is not such a significant barrier and therefore this group is worth giving extra consideration as a target audience.

Domestic success:

- Domestic Success comprises high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.
- Families in Domestic Success are headed by couples typically aged in their late 30s and 40s, many of whom have school age children. Parents in this group are the most likely to have a degree and may have delayed having children until their careers were established.

<https://www.youtube.com/watch?v=8i17xgAwIDk>

G Domestic Success	G26	Cafés and Catchments	Affluent families with growing children living in upmarket housing in city environs
	G27	Thriving Independence	Well-qualified older singles with incomes from successful professional careers in good quality housing
	G28	Modern Parents	Busy couples in modern detached homes juggling the demands of school-age children and careers
	G29	Mid-Career Convention	Professional families with children in traditional mid-range suburbs where neighbours are often older

These three audiences appear to chime closely with the visitor types the SHIH attractions describe anecdotally. The notable opportunity for SHIH is to look at growth of the family audience to broaden their appeal. The families described in the Rural Reality group could represent a particularly significant number of people because 25,883 households in this non-fit category lie within a 40 minute drive of Spalding.

It also suggested that SHIH consider the ‘Junior School’ age group (7-11 years) due to the nature of the buildings (steep, working machinery, open water, fire, etc), and look at grandparent-led as well as parent-led visits. The possible further addition to this would be for Moulton Mill to consider a pre-school offer early on weekdays on the ground floor if there is local demand.

3.1.2 Driving growth through an excellent visitor offer

Having established that there is headroom within the existing local audiences, and explored in more detail what type of people these are, we now look at the visitor offer each attraction has and how this could be developed to drive growth (and secondary spend). There are two elements to examine: firstly the consistent core offer, and secondly the changing parts of the offer through programming.

a) Developing a consistent core offer

The strongest visitor attractions have several distinct parts to their offer (often called ‘components’), with each component giving a different type of experience to the visitor (ideas/intellectual, people/emotional, objects/sensory, physical etc).

All three site score very highly in giving strong and varied offers (refer to the analysis in Appendix A3 and the ‘Everything Speaks’ NT Handbook in Appendix A4). It’s generally expected that attractions of the scale of SHIH would offer up to four distinct components, as these do.

- Moulton Mill: Mill tour (people), hands-on interpretation area (objects), Woad exhibition (ideas), outdoor walkway (physical/sensory);

- Chain Bridge Forge: Forge interior and equipment (objects/ideas), watching a demonstration (people/physical), taking part in making something (physical/sensory), Innovation/3D printing Area (objects);
- Pinchbeck Pump Engine: Interpretation area (ideas), Tool Display (objects), Wheel (physical/sensory), Outdoor Space

Due to the small scale and footprint of the SHIH attractions there's limited space to create additional components, but each of the existing ones could be enhanced. It's advised that the SHIH heritage attractions spend time together thinking further about their offer and how they can take it to the next level. Suggestions to get the ball rolling include:

Moulton Mill

- Make a mess. Consider making a bigger thing of grinding days, and of having types of grain and flour to touch and smell every day, and asking questions such as "How does this translate through to the baking process?"
- Talk to people, about people. For guided tours, consider developing different types of tour that are more about the Mill's social history and the people who worked there. Research shows that stories about real people told in small groups are consistently the most popular aspect of guided tours at NT properties. In addition the first 10 minutes of any tour should be about listening to the visitors (why are they here, what knowledge do they bring), not about the place. Taking the time to get to know the group is worth it, because many visitors are also looking for a social day out.

Chain Bridge Forge

- Distinct parts to the experience. Consider strengthening the core offer, and making a clear distinction between the types of experience a visitor can get (and recruit volunteers to match). We suggest three potentially distinct offers: a more formalised welcome and introductory talk (the first room could be de-cluttered and become a welcome space with some basic interpretation); the opportunity to make something yourself, OR the opportunity to watch a demonstration of the blacksmith making something (or helping someone else to) and talking through his process. Both of these are amazing, memorable experience, but be explicit and ask people which they would like to choose.
- Ask, don't tell. The forge would be a great space to use a curiosity/questions approach, allowing visitors to handle some of the equipment, and instead of telling them about it, ask them questions such as, "What does it feel like? Do you think it gets hot? How old do you think it is? If it had feelings, what do you think it would be saying right now?"

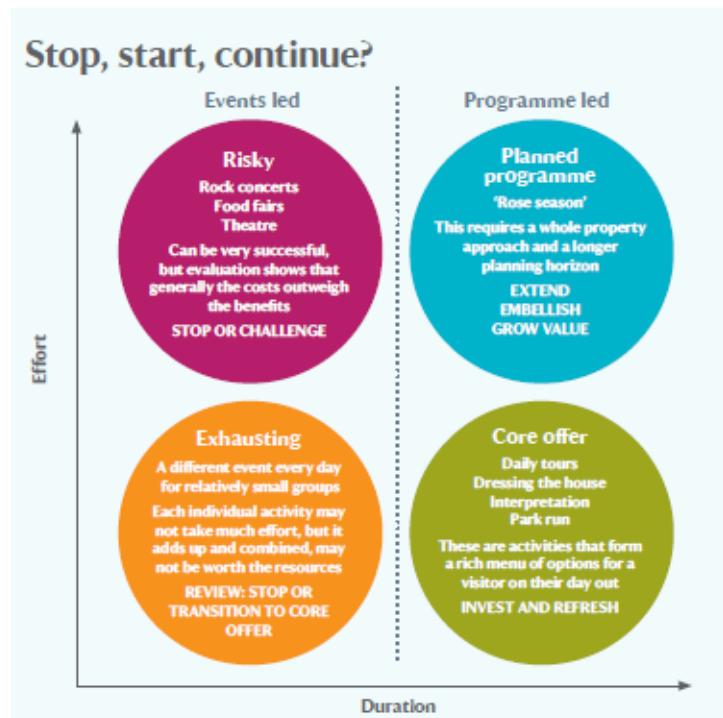
Pinchbeck Pump Engine

- Make the most of the outdoors and workshop spaces. It would be useful to develop ideas for things people can do in these spaces that are pertinent to the story of this place, for example touching and holding things that relate to the heritage.
- Whilst not about content, opening the site for at least weekend day, would build consistency with the others in SHIH and make a big difference to the audience groups who could access the site

b) A programmed offer

Nurturing a core visitor base of local people who feel a deep connection to SHIH and regularly return is the key to a sustainable business. It also makes economic sense – it is far easier and cheaper to market to existing visitors than to be constantly in search of new audiences.

As a starter, the following are suggested:



The challenge is to keep the offer fresh, and provide reasons for existing visitors to return. To this end, it is recommended moving to an offer that includes planned changes. It is recommended that these should not be one-off events (which require a lot of planning and time for one day). Instead, look at ways to create a new focus, or regular special days. The NT experience is that fewer is better i.e. doing fewer events that last longer or are repeatable.

An effective programme will turn first time visitors into second time visitors, occasional visitors into regular visitors, and regular visitors into loyal supporters of SHIH.

Again, it is recommended that a discussion workshop involving all three organisations is organised to look at their current events programme, review what works and what could stop, and generate ideas for how this could work for them individually and collaboratively. These should then be repeated on a regular basis going forward (refer to Appendix 4 'Reasons to Return' for more details, including a sharper version of the image to the left hand).

Moulton Mill

- Grinding Days – it would be a great advantage to attracting visitors if there was a way these can be given some predictability. For example, defined weekends once a month, but with potential visitors directed to check the website for wind conditions/confirmation nearer the given dates. Give a flavour of what it's like even if you end up with a still day (and if you have to postpone a planned grinding day, do an extra one some other time). Clearly, the practical and human resource implications need to be factored in if this suggestion is followed through;
- Family Baking – throughout the summer, consider building a bread/pizza oven and have a fire pit where families can make simple flour-based foods such as pizza, raisin bread etc to make and cook as part of a shorter family tour ticket;

- Pre-school Go Bake session – the meeting room would be a perfect venue for <http://www.gobake.co.uk/> which offers simple cookery sessions for 2-4 year olds, and baking parties;
- Pancake Day – this could be a popular activity. In France they have big flour fights which could be a lot of fun!
- Great British Bake off – screen it for the duration of each season and sell it as a watch and eat cake package;
- Community Picnics/Feasts, Pizza night and other additions to the Fish and Chip night concept.

Chain Bridge Forge

- Blacksmith experiences – firm up the options from the drop-in taster session (between £5 and £10) to the 2 hour pre-booked experience (£40), or the full day package (£80-£100);
- With the drop-in taster sessions, look at varying the product seasonally to give reasons to return (Valentine heart, Christmas decoration, toasting fork, knife, key ring, initials, house numbers etc as appropriate). Make it a bit of a theme, and produce both 3D printed and blacksmith versions of this to display in the shop and advertise outside.

Pinchbeck

- The outdoor space would be an excellent location to add in some hands-on playful replicas (children and adults alike love to experiment with moving water using different systems). Could Chain Bridge Forge make some replica tools from the excellent display, and allow children to dig tunnels in a sandpit to get the experience of what the different shapes feel like to use?
- Don't feel you have to tell all your stories at once, phase different parts of the interpretation around different areas year on year. You already have all the material, but make a deliberate decision to focus on different parts of the story, give it a title and store some of the panels, maps and props until next year.

Collectively

- Heritage Open Days, September each year – organised in Lincolnshire by Heritage Lincolnshire, these attracted 20,000 visitors across the County in 2016. Only Pinchbeck Pump Engine was included in the 2017 programme, but attracted over 100 people. The deadline for registration in 2018 is the 30th March. Go to <https://www.heritagelincolnshire.org/heritage-open-days> for further information;
- Costumed Interpretation Weekends or a Living History Month – avoid doing these as one-offs; rather, have a programme when they are the first weekend of every month, or a whole month each year is dedicated to this approach;
- A summer programme with simple, repeatable family activities, including a family menu in the café, together with shorter, more hands-on tours, talks and demonstrations, dressing up, etc;
- Woad Festival – we suggest consideration is given to extending this to all three sites. For example, if practical, determine an area at Pinchbeck be used to plant Woad (using tools made at the Forge). Then use the dye to make a special blue rag rug using the outdoor

space. If there was something Chain Bridge Forge could make that uses both metal and Woad, that would create a wonderful link between the different heritage.

3.1.3 Brand and visual identity

As part of the process of coming together as three organisations under the SHIH banner, there is a pertinent opportunity to re-affirm what each organisation is individually, as well as SHIH collaboratively.

This can be approached in a number of ways, but one approach is to talk together to come up with your own unique personalities.

- What are the five words that best describe your ‘personality’ and style...what words are unique to you? Are you strong, rustic, industrial, tactile, sparse, showy, competitive, reliable, etc for example?
- What colour best defines you? (For example, Chain Bridge: Orange and Black represent the hot coals on the hearth, Pinchbeck had a green paint that ran through the building)
- What materials are most associated with you? How can you use those materials to enhance the atmosphere and signage on your site? (For example, at Moulton Mill: burlap/hessian, wood, sail cloth and paper bags could all be used to inspire everything from signage to table cloths)
- What is your font? (For example, Pinchbeck had type on luggage tags and industrial metal capital letters). What is your graphic? How do the graphics from the three sites sit next to each other?
- Equally importantly, what are you not? What should not be on your site and does not represent your style?

Gather these into mood-boards and walk round each other’s attractions, asking questions such as:

- What needs to come out, what could be replaced with something more appropriate?
- What was meant to be temporary and is still on display?
- Are you proud of your appearance from the moment a visitor steps onto your site?
- When buying something new, from a plant pot to an interpretation sign, how can you construct it in a way that adds to your spirit and atmosphere?

3.1.4 Partnerships

Springfields Shopping and Garden Centre does present an opportunity for SHIH to reach a wider audience, but in our view not for a few years, partly because the shopping/garden centres own marketing and promotional material showcases a visitor offer that has little synergy with that of SHIH. We would recommend instead that in the first 3 years of the business plan, SHIH focus on growing the consistency and quality of its own core offer, and developing a collective programmed offer that is cross-cutting, which as outlined above will nurture your core audience and

increase the reasons to return, whilst simultaneously helping you to grow into the headroom within your key existing target audiences. This doesn't mean that SHIH should not work with the managing organisation for Springfields or individual business based there to promote SHIH as places to visit, to promote events, or recruit general and corporate volunteers, but that the effort expended on this is proportionate in the early years of the SHIH collaboration. Once solid foundations for the collaboration have been established, SHIH will be better placed to explore a deeper potential relationship with Springfields, etc.

A range of recommended actions under the audience development and visitor experience workstream follow below:

Action	Further detail/benefits	How this would be implemented	Accountable person	Priority	Estimated Cost
1 Create a timetable of meetings and workshops to keep the three sites in regular contact, to explore different issues and opportunities in relation to the visitor offer and visitor experience, and share evaluation and feedback.	To regularly discuss, both as individual organisations and as SHIH, the provision of a consistent core offer	A regular diary date every two to three months, hosted by each organisation in turn.	TBC	Short-term	Time primarily
2 Peer review of core visitor offer	To look at each other's sites, with fresh but expert eyes to give constructive feedback.	Refer to sample peer review form in Appendix A6 which would be used to frame the peer review. Could be tied into the meetings proposed under Action 1 above.	TBC	Short-term	Time and budget to implement quick wins identified, but dependent on work identified.
3 Evaluation: Agree how you will collect data and what you feel it is important to measure. (A fuller discussion on monitoring and review is set out in Section 5)	Measure visitor numbers and feedback consistently across all three sites so data can be reviewed together. Consider creating a comment card that all three organisations can all use.	Refer to sample comment card provided in Appendix A7. Suggested questions for SHIH to ask its visitors could include: <ul style="list-style-type: none"> - What did you particularly like? - Are there things we could have done better? - How enjoyable was your visit, rated 1-5? - What postcode have you travelled from - Who are you with today? Etc 	Nominate specific individuals at each site who are interested in this area to be the leads, and to collate visitor feedback.	Short-term	Small budget needed to create comment cards.

4	Organise a workshop on brand, spirit of place and visual identity (this is also referred to in the Marketing and Communications strategy as it will impact on the proposed shared website)	Every detail counts, and having a strong sense of your style and atmosphere will help visitors to feel they know who you are, what you are about, and that you are something special and different.	Recruit (could be existing or new) volunteers who are particularly interested in this area to develop some suggestions and implement gradual changes to enhance the atmosphere of each attraction.	Volunteer teams will need to be championed and supported by the leaders of each site, so they are given the authority and respect to make changes.	Short-term	Time initially. Budget will be needed to implement changes agreed
5	Form a programming group	Regular visitors need reasons to return. Once the new website and social media is established, it will be time to start trying new ideas that can be properly marketed under the SHIH umbrella.	Recruit (could be existing or new) volunteers who are particularly interested in this area to plan for co-ordinated programme development.	Changes could have more fundamental cost implications so this group will need to come back to the decision makers for authority to proceed.	Medium-term	Time initially, although a budget will be needed to implement the ideas
6	Form a family group to look at core offer for families, programming opportunities, retail and catering, summer holidays etc.	Your key target audiences include a number of family groups, that at certain times of year you could benefit from creating a clear welcome and simple offer for them.	Recruit (could be existing or new) volunteers who are particularly interested in this area to develop some suggestions and implement gradual changes to become more family friendly.	Volunteer teams will need to be championed and supported by the leaders of each site, so they are given the authority and respect to make changes.	Medium-term	Would be ideal to give the group some small seed funding so they can make some immediate changes.
7	Form a research group	In the longer-term, you may be able to co-ordinate changing interpretive themes across the three sites that comprise SHIH to create greater impact and additional reasons for visitors to return.	Recruit a group of volunteers particularly interested in following up on the recommendations of the programming group. For example, looking into the role of women at the three sites, the impact of WWI and WWII etc. This will enable the sites to vary the focus of their interpretation in future years.	Volunteer group, that involves members of all three organisations potentially	Long-term	Time initially

3.2 Volunteering

At present, the volunteering offer is very different at each of the three organisations that comprise SHIH, with no volunteering at Pinchbeck Pump Engine through to a structured offer at Moulton Mill involving a good number of volunteers. This means that each organisation is coming from a very different starting place and therefore each will gain in different ways from a collaborative approach.

If SHIH are to fulfil their potential it will be vital they build on the passion people already have for the three sites and create a flexible, exciting, rewarding and mutually beneficial volunteering proposition. Volunteers' skills and experiences must be used effectively and a range of opportunities will need to be provided, from unskilled to highly specialised. Propositions should respond to the motivations of volunteers today, resulting in teams that will be advocates and champions and will help to raise the profile of SHIH both locally and further afield.

It will be vital that the all three organisations involve their volunteers (or in case of Pinchbeck, the two on-site staff) as early as possible in planning and implementing the suggested actions because their cooperation and commitment will be key to success.

Moulton Mill and Chain Bridge Forge don't currently have an accurate picture of the full costs of volunteering to each organisation. It is suggested that this information, along with data on volunteer numbers, roles and hours per annum is calculated as a starting point/ baseline for future comparison (refer also to Section 5 on monitoring and review).

If Moulton Mill does recruit a paid General Manager, it will have a big impact on what can be achieved and the managing organisation will need to be careful to identify whether the other two sites can expect to gain from this and how it will affect overall volunteer management. An alternative would be to look at appointing a paid volunteer manager jointly across all three sites but with a bigger stake in Moulton Mill. At the present level of operations things are just about sustainable as they are (with the benefit of the existing Mill Manager's experience in managing volunteers at Moulton Mill and the good systems already in place there to act as an example). However, once there is any increase in visitor numbers, volunteer numbers and general operating aspects (e.g. retail and catering) at any of the sites, this will put pressure on the Trustees/Directors and voluntary volunteer managers.

The first step to be made is for the three organisations comprising SHIH to agree, and then implement some *common* volunteer management systems and processes that are applied across the collaboration. There is a considerable good will from current volunteers across SHIH, and this should not be lost by imposing disproportionately associated rules and regulations. However, a lack of strong systems and processes runs the risk of future problems and issues arising, will not foster a professional approach, and may make it harder for the organisations to make changes when needed. It can lead ultimately to a rather *laissez faire* impression, with volunteers feeling they are not valued or recognised over time, but instead taken for granted.

Research carried out by the National Trust (refer to Appendix B1) suggests that there are plenty of people in communities who are potential heritage volunteers. At the same time, the volunteers of the future will be more demanding, and expect more choice in what they do and how

they do it. They will also expect clear benefits in return for giving their time. At present there seems to be a disconnect between what people want and what heritage organisations can offer, whilst in general people have less time nowadays, are more influenced by the economic downturn and are much more technologically aware. This will mean South Holland Industrial Heritage will need to:

- a) Be more flexible in their collective volunteer offer (for example, provide short term/temporary roles and roles for families to take up together);
- b) Make it easier for people to find out what is on offer and to then join up and take part; and,
- c) Think carefully about ensuring their volunteering is fulfilling and enjoyable as well as being consistently well managed and organised. Working with local partners and local communities will also become an increasingly important aspect.

CVS Lincolnshire is finding that the numbers of people applying to volunteer through them is falling, and this is particularly notable in the South Holland area. People do not want to travel far to volunteer and definitely expect expenses to be paid. CVS tend to get more enquiries from people who are less skilled. As a consequence, if a role sounds too vast and daunting it will put people off, and therefore recruitment campaigns for volunteers need to be friendly and welcoming. People are also less keen on committing to set times nowadays and timings need to suit them, public transport availability, etc.

SHIH may be able to tap into the time banking system being driven by Tonic Health (refer to www.tonic-health.co.uk/Timebank.asp) where participants deposit' in a time-bank, perhaps by giving practical help and support to others, they are able to 'withdraw' equivalent support in time when they themselves are in need.

A range of recommended actions for volunteering follow below:

	Action	Further detail/benefits	How this would be implemented	Accountable person	Priority	Estimated Cost
1	Welland and Deepings IDB commit to taking on volunteers and develop an ambition/ plan accordingly	Volunteers will deliver huge added benefit to the daily operation of PEM and enable the site to be open for more days of the week/weekend.	Karen to take a proposal to the relevant IDB decision making body	Karen	Short-term by April 18	N/A
2	Moulton Mill and Chain Bridge Forge to collate base line data on volunteering currently – numbers, hours, full costs to the organisations.	It will be much easier to plan for the future once the current situation is fully understood. Data of this kind is also useful for annual reports and grant applications.	This may involve asking all the current volunteers to complete a survey form	Trustees/Board of Trustees	Short-term By April 18	N/A
3	Each site to check data bases of volunteer	To ensure compliance with new GDPR data regulations that	East Midlands Museum Service (EMMS) can provide advice. Ideally one or two	Janet, Geoff	Short-term	May need to employ someone

	information are up to date and secure	become law May 2018 (refer to Appendix B2)	volunteers would be appointed to lead on data, and should have a specific role profile for this.		By May 18	for 2 days. Indicative cost £300
4	<p>Set up a small focus group representing each site, to lead on bringing some of the key systems and processes together so they are consistent across the sites.</p> <p>Start with the tasks listed below (a - g) and aim to implement by early 2019</p>	<p>With all the improvements below in place this will help to attract today's volunteers, ensuring sustainability and a greater diversity of volunteers. You have to have strong basics in place before you can go out and recruit volunteers with the right skills. Nowadays you can't just rely on people's good will.</p>	<p>Write a role profile for the representatives and agree on some common aims and requirements before starting on points a-g. Recommendations (which will need to include cost estimates) from the Focus group will need to be taken to each organisation's decision makers for approval</p>	<p>Janet, Geoff, Karen</p>	<p>Short-term By May 18</p>	N/A
a)	SHIH to agree a volunteer reward and recognition process	This will help in retaining volunteers and improve their performance	Keep this realistic and achievable long term	Focus group	<p>Short-term May- Sept</p>	May be a small cost once implemented
b)	SHIH to develop and adopt a tighter recruitment selection procedure for taking on new volunteers	<p>This will avoid taking on people that are not appropriate, who don't have the required skills, whose expectations cannot be met, where there is no mutual benefit or where people would need more support than the sites are able to give.</p> <p>Volunteering should be mutually beneficial to both parties and this is the time to check this will be the case</p>	<p>The key selection criteria should be made clear in the initial role profiles and a set of 'interview' questions should be put together to make sure new volunteers have an appropriate attitude as well as the necessary skills for the role, and that any special needs can be accommodated easily</p>	Focus group	<p>Short-term May-Sept</p>	N/A
c)	SHIH to develop a joint core induction programme and materials	This avoids problems in the future and makes sure everyone's expectations can be met	See the example of Induction checklist in Appendix B3. SHIH should also think about who will deliver the inductions at each site.	Focus group	<p>Short-term May-Sept</p>	N/A
d)	SHIH to adopt a common travel expenses policy for implementation in April 2019 (or start of financial year)	If expenses are not offered it will deter those who can't afford to get themselves to the sites e.g. young people. Volunteers expect to be offered expenses nowadays and CVS expect that the opportunities they promote will have this. Remember, not all volunteers will claim expenses but they should be offered.	<p>As an example, the NT uses either 13p per mile for fuel only, or 33p per mile to cover running costs, with the volunteers choosing which option to use. SHIH should set a max distance that volunteers can claim for, such as 10 miles each way.</p>	<p>Focus Group and organisational decision makers</p>	<p>Short-term May-Sept</p>	None until implementation in year 2

e)	Each organisation to share role profiles and develop a common approach/ template across SHIH where possible	The best from all will be incorporated into one.	A range of examples are provided in Appendices B4-B9. Each organisation within SHIH should bring their current roles in line with each other and produce revised role profiles for each	Focus group	Short-term May-Sept	N/A
f)	SHIH to agree on common standards for volunteer welfare e.g. tea and coffee provided, decent toilet and rest facilities, places to keep belongings, protective clothing etc.	This will make the operations more professional and means each organisation/SHIS is less likely to get complaints or find volunteers are leaving. It will also encourage volunteers to recommend volunteering at SHIH to others	Cost will need to be taken into account.	Focus group and organisational decision makers	Short term May to Sept	None until implementation in year 2
g)	Sites to investigate a new joint insurance policy to cover their collective volunteers	To provide a consistent approach and cover. It may also be cheaper to have shared insurance, especially if volunteers are going to move between sites e.g. to support cross site programming or events	An analysis will need to be done of the current policies in place to make sure they are adequate and do cover volunteers for things like public liability, personal possessions on site, working at other sites from the main one (including the farm) etc. Then a nominated person will need to shop around to find the best deal. NT volunteers are only insured if a) they are registered with us b) they are doing work NT has asked them to undertake	Organisational decision makers	Short-term May-Sept	Yes, but probably not active until year 2 and may be less than they are currently paying
5	Trustees, Boards of Directors, etc and volunteer managers (staff or volunteers) to attend volunteer management training courses	Training will help to minimise difficult situations with volunteers from arising and will help to deal with those that do. It will also benefit all the volunteers at the site if they are well managed.	The following courses are suggested: Leading Future Change with Volunteers, Managing Difficult Situations. EMMS also run courses and meetings that will be useful.	Karen, Geoff, Janet, Training provider	Short-term April - Sept	Could be delivered through mentoring work, or accessed via EMMS
6	Each organisation within SHIH to agree and set budgets for volunteering for the next 5 years	This will ensure the three organisations are better prepared to meet associated costs	The combination of assessing the current situation and putting targets and plans in place for the future will aid the budgeting process.	Organisational decision makers	Short-term Nov 2018	None
7	Implement joint systems across SHIS and processes as identified by Focus group in year 1	Once these are implemented and working, the recruitment plan to get more volunteers can be started but only once the	The three organisations should aim to implement new systems at the same time although it may work in some cases to have a trial run at one place first and	Organisational decision makers	Medium-term Spring 2019 (if not before)	Annual cost to be budgeted for e.g. £1000 excluding expenses – refer

		<p>new improved, joint systems are actually in place. This will ensure a better success rate with new volunteers.</p>	<p>assess how well the changes are working. It will be really important to communicate all changes well with volunteers and give them a chance to voice any concerns before implementation.</p>			<p>to the action above.</p>
8	Consider installing a new joint data base of volunteers across SHIH	<p>To ensure future compliance with new data regulations, and to give volunteers confidence in the operations. It will also be useful for contacting volunteers easily and keeping track on any changes to volunteers' personal circumstances.</p>	<p>This could be a joint system or just the same system but run separately at each site. (Joint would be better if the sites are going to share volunteers at times across all the three operations).</p>	<p>Data volunteers and organisational decision makers</p>	<p>Medium-term Spring 2019</p>	<p>There may potentially be a need to purchase a new data system</p>
8	Develop an internal newsletter for volunteers across SHIH	<p>Make it electronic and have paper copies on site that volunteers who don't have computers can still access it; overall, this will save money.</p>	<p>Referenced in the Marketing and Communications Strategy. Could largely be written by volunteers.</p>	<p>Newsletter volunteer, Karen, Geoff, Janet</p>	<p>Medium-term Spring 2019</p>	<p>Minimal if done in house and distributed primarily electronically</p>
9	Implement a consistent volunteer expenses policy across all three organisations	<p>As set out in Task 4d above</p>	<p>Estimate. For example 13p per mile for a round trip of 20 miles, 30 times a year = average of £78 per volunteer per year, for those that claim</p>	<p>Organisational decision makers</p>	<p>Medium-term From 6th April 2019</p>	<p>A significant cost that needs to be calculated in planning for a consistent volunteer expense approach</p>
10	Use the action plan for audience development and visitor experience, the marketing and communication strategy and the fundraising strategy to determine how many more volunteers will be needed, what new roles will be needed, and what audiences to target e.g. young people for social media roles. Set targets for recruitment.	<p>Will need a clear idea of targets of volunteer numbers and roles for the next 4 years. A targeted recruitment campaign is much more likely to succeed.</p>	<p>Set up a small group of volunteers to work on recruitment.</p>	<p>Recruitment group – (set up by Karen, Geoff and Janet)</p>	<p>Medium-term May 2019</p>	<p>N/A</p>
11	Design a number of new joint volunteer roles e.g. events, storytelling, crafts, talks speakers,	<p>Some roles would work well by being joint across all 3 sites, especially the more specialised ones and the ones where the</p>	<p>SHIH will need to work through all the other plans for the sites to see where volunteers are needed and could add benefit at a cross organisational level.</p>	<p>Recruitment group</p>	<p>Medium-term June 2019</p>	<p>N/A</p>

	fundraising, photographers, marketing.	work load may not be a regular one day a week. Seeing volunteers work across all 3 sites will bring other benefits too.	Talking to other organisations, for example the National Trust will help. A range of example role profiles are provided in Appendices B4-B9			
12	Develop a SHIH Volunteer Recruitment Plan that includes the tasks a) - f) listed below	On-going recruitment can be happening along the way but once all the systems and processes are aligned and in place it would be advantageous to launch a recruitment campaign for the 3 sites jointly, under the SHIH umbrella, which will give much more coverage. It is worth remembering that word of mouth is vital – the majority of NT new volunteers come forward in this way.	Refer to Appendices B1 and 10 to inform the approach to the recruitment plan. Timescales and ambition will depend on the budget available. Each organisation will need to be ready for dealing with lots of responses, so administration will need to be organised. Early September is a good time to launch a recruitment campaign. We know that: 66% of people find out about volunteering by word of mouth, and 20% of people who volunteer have previously used the services of the charity or organisation, whilst only 15% of people respond to a leaflet or a poster. Less than 2% visited a local volunteer centre (<i>Statistics from the National Survey of Volunteering and Charitable Giving 2007 by the Institute of Volunteering Research</i>)	Recruitment group	Medium-term June - August	None to develop the Recruitment Plan. However, a budget will need to be allocated to resource aspect of the plan's delivery, including the actions that follow below.
a)	Develop joint SHIH recruitment materials	The recruitment materials need to look professional, although costs will be reduced if these are shared across SHIH. Print as well as digital will be needed	Ideally find a volunteer with some graphic design experience/aptitude. Design a flier, and poster that can be adapted for use on web sites and social media. It will need good quality, close up photos of volunteers (a variety of ages, etc to suit targeted promotions)	Recruitment group	Medium-term August 2019	Printing costs.
b)	Prepare a new page on volunteer recruitment for the shared SHIH website	The majority of National Trust applications for volunteering come through its web pages. The volunteer page can already be up on the new web site from its creation but for the autumn 2019 recruitment campaign it will need to be ramped up with new images, roles listed etc.	Through a website volunteer ideally Direct people to the website through all other platforms such as printed or digital. Therefore, its key at the website is prepared in advance	Recruitment group	Medium-term August 2019	None if a website/marketing volunteer is in place
c)	Prepare inserts for other social media forms in particular Twitter, Facebook	The more the better, to raise awareness on a regular basis	"As per marketing and communications strategy	Recruitment group	Medium-term Autumn 19	N/A

d)	Promote volunteering through local magazines	Raising the profile of the new jointly 'branded' SHIH sites will generate interest. Support locally is important for future sustainability and the more people volunteer from nearby, the lower the expenses budget.	Links with local communities and word of mouth should be capitalised on, use all the existing volunteers, Trustees, Directors, etc to spread the word through their networks	Recruitment Group	Medium-term Autumn 2019	Minimal, look for free ones
e)	Leaflet drops in new housing estates, especially in Spalding	New residents are much less likely to have heard of SHIH and some will be keen to get involved in activities that help them meet new people, such as volunteering	Ask for volunteers to do this, get families to help, find out where people live and draw up a map, new volunteers e.g. students could be recruited just to do this.	Recruitment group	Medium-term Autumn 2019	Could be some volunteer expenses
f)	Work with other partners and stakeholders to promote volunteering opportunities	The National Trust are finding this approach really helps with diversifying the volunteer base, other organisations will have better links into groups e.g. young people	For example, through a joint approach with CVS, local primary school parents, older pupils in secondary, colleges, scouts, use of promotional opportunities within the Springfield's Shopping & Garden centre	Recruitment group	Medium-term Autumn 2019	Minimal
13	Consider setting up a short volunteer survey to track satisfaction etc.	This gives you really good insight into how things are going, especially once you have more people doing a variety of roles	This can be done very simply using survey monkey https://www.surveymonkey.co.uk/ and need only have a few questions that can be repeated year on year. For example, questions could have a 5 point scale from strongly agree to strongly disagree and could cover the following: would you recommend volunteering; how well is your volunteering organised and managed; are there opportunities to share ideas; are you consulted when there are changes to be made; are your skills used effectively; is there adequate training.	Organisational decision makers	Medium-term Implement in 2020 /year 3	None if the survey is short
14	Consider providing an accredited apprenticeship scheme e.g. in blacksmithing	This can generate funding, give you kudos and promotion and also dedicated people for a period of time. The word 'apprentice' should only be used for official, accredited schemes.	There is information on apprentice schemes at www.gov.uk/government/publications	Organisational decision makers	Medium-term 2020	Charges for training and registration
15	Develop a number of group volunteering opportunities that involve volunteers from each of the three sites	This is a useful way of getting larger jobs done more quickly as well as raising awareness and possibly some funding.	For example, winter cleaning, tidying up of grounds, painting. You can ask groups to provide tools, paint etc as part of a package where you provide tea and coffee, soup, etc.	Organisational decision makers	Medium-term 2020	Some tools and equipment will be needed

16	Carry out a joint SHIH stakeholder mapping exercise and create a list organisations who may have an interest in encouraging their members/employees to volunteer	For example, local businesses, Springfield's Shopping & Garden Centre, Women's Institute, local schools and colleges	Could lead to team building days, and support/help with delivering larger projects	Organisational decision makers	Longer-term 2021	N/A
17	Develop a recruitment plan for new Trustees / Directors	<p>With the profiles of the organisations with SHIH raised following all the activities up to this point years, securing new Trustees/ Directors should be easier</p> <p>However, as the organisations evolve, the roles of Trustees will also change, so this offers a good opportunity to review role profiles and make sure they are fit for purpose going forward.</p> <p>Understand the key skills, experience and knowledge needed across organisational Boards, identify the gaps in the current Boards make up, and use this to help pin point the skills sets etc required of new Board members, and from this who in your collective networks, including existing 'operational' volunteers may have what you're looking for</p>	<p>A similar approach can be followed to that set out for more general volunteer recruitment in actions 12a to 12g above, together with a clearly defined and well-prepared induction process.</p> <p>Best practice shows that a personal approach, for example, face to face, or my telephone (rather than by email, etc) to prospective Board members, has the best chance of success.</p> <p>Remember to pitch the benefits of being a Board member, and support Board members will receive, as well as the responsibilities of the role.</p> <p>A push for new Trustees etc could, to some extent, be undertaken at any point in the 5 year business plan. However, it would probably be better to establish the collaborative working between the constituent parts of SHIH with the input of the current Trustees / Directors, before looking for new ones unless there is a pressing need.</p> <p>Additional guidance can be found at https://www.gov.uk/government/publications/finding-new-trustees-cc30/finding-new-trustees</p>	Trustees	Longer-term 2021	N/A

3.3 Marketing and communications strategy

The National Trust has been increasingly encouraging its properties to work collaboratively to share marketing costs and increase the impact of communications. This includes collaborative leaflets and shared press releases to maximise opportunities for the collective heritage sites and *together*, better attract the attention of the media through a more targeted and planned approach.

For these same reasons we recommend a similar strategic approach to marketing and communications for South Holland Industrial Heritage.

This will increase the quality of your marketing and communications content, and allow you to share financial and time resource costs, and communicate more directly with your audience, especially at a local level. The latter has been identified by the MOSAIC analysis as your most opportune area for audience growth.

We have ordered our recommendations into a marketing and communications strategy (refer to the spreadsheet within Appendix C1)

For Year 1 detail is provided about what should be actioned when. In years 2-3 a template for a marketing and communications calendar is provided. This can be used to plan your activity each year and outline how/when you will deliver it. This will greatly depend on which of our audience development recommendations you have chosen to pursue or have introduced yourselves, and therefore we have provided only a broad guide of how this could look. For years 4-5 we have simply provided a calendar template for you to use because by that time you should already be comfortable with your annual marketing and communications calendar, and you can add any new plans for activity.

Alongside the marketing calendar we have supplied an example social media calendar (refer to the relevant tab within Appendix C1). In this case, we recommend each site/organisation take a day a week as their responsibility and other activities and events are planned in accordingly. This would then ideally be expanded to have monthly plans in place which will allow you to use the free scheduling tools within each social media channel to help organise your communications and workloads. We also recommend you promote yourselves alongside well known celebratory days that attract high levels of engagement on social media such as Lincolnshire Day, National Mills Weekend and Heritage Open Days. In our example, we have included Lincolnshire Day.

We have also provided a guidance document and template for writing press releases (Appendices C2 and C3). These will need to include the branding of South Holland Industrial Heritage, once this is determined. Media lists for the NT properties of Belton and Tattershall Castle (Appendix 4A and 4B) provide key locally relevant media links for SHIH.

The immediate recommendations we provide surround the need for a new collective website to include all three heritage sites, and unified social media platforms to support the shared website. These are recommended as the core priorities in the first year of the marketing and communications strategy.

3.4 Fundraising strategy

Strategic and focussed fundraising activity has a clear benefit for maximising income. However in order for it to be a *sustainable* income, there needs to be a clear plan of development and fundraising initiatives that provide a regular income.

South Holland Industrial Heritage will need to work collaboratively to define a shared cause message to strengthen the fundraising proposition. Whilst there may be opportunities to fund-raise together under one banner, the organisations are also very different in what they deliver at each site, and have different legal constructs, and it is therefore also recommended that each organisation has its own separate plan for fundraising alongside the collective endeavour.

Key recommendations with respect to fundraising collaboratively are set out in the Fundraising strategy (Appendix D1) plan and will help the collaboration to grow support across the three sites. The most immediate action is to have a shared fundraising page on the proposed shared website. This would ideally have a mechanism to take donations and depending on functionality, supporters would be able to tailor their donation by site; by gift amount or by project.

Other ways to fund-raise collaboratively may include joint grant applications. Appendix D3 provides a funding search for the local area undertaken through the National Council for Voluntary Organisations (NVCO) and suggests suitable local grants that may support collaborative projects, for example a shared website and marketing activity. If SHIH are considering a combined application to the Heritage Lottery Fund for example, further thought on the ambition of the collaboration and the type and scope of any project will be needed, and for this reason, we have placed this in Year 3. The other recommendations are focused on ‘business as usual’ where fundraising activities can be aligned, for example with each site developing an onsite ‘invitation to give’.

In terms of opportunities for securing external grant support, several key opportunities have been identified:

- A new Heritage Lottery Fund Resilient Heritage application, under the SHIH umbrella, which may provide support towards the work needed to develop common volunteer systems and processes, training for volunteers, marketing, etc. This grant programme has a rolling application process;
- A Coastal Action Zone LEADER programme, which will support rural tourism including visitor attractions, destination marketing and promotion. A collaborative project around the marketing elements of the business plan may be appropriate together with volunteering, especially if this is strongly linked to the key LEADER outcomes concerning potential job creation, training and skills development (Note: the deadline for a project enquiry form for this funding programme is the 31st May 2018).

Clearly the scope and timing of any shared funding application will depend on the agreed priorities of SHIH.

The fundraising strategy also includes other suggestions to explore, such as a raffle and second hand book sales, but ultimately it is about sharing the organisations cause with visitors, harnessing local support from the community and providing messages about the importance of supporting local heritage. It's worth remembering that 'people give to people' so do harness your local connections as ambassadors for the collaboration. A sample Fundraising plan for Years 1 to 3, which will help to map out the activity referred to is also included in Appendix D1

Finally, it is important to ensure that all fundraising activity is fully compliant. Hyper-links to the Fundraising Regulator have been added to the action plan, together with guidance on GDPR (General Data Protection Regulation), which will begin in May 2018 (refer to Appendix D2).

4. Financial Forecast 2018-2023

The following table provides a high level indicative financial profile for the five years of the business plan. Ultimately, the budget allocated will depend on the ambition of the collective organisations within SHIH:

WORK-STREAM	FINANCIAL YEAR				
	2018-19	2019-20	2020-21	2021-22	2022-23
Audience Development					
Implementing 'quick wins' to improve consistency of visitor experience across all three sites	£1000				
Implementing programming across SHIH		£1500	£1500	£1500`	£1500
Developing the offer for families		£500	£500	£500	£500
Volunteering					
Ensure GDPR compliance across SHIH	£300				
Implementing a common volunteer expenses policy	TBC once a true understanding of volunteer expenses has been calculated	TBC	TBC	TBC	TBC
Implementing common volunteer processes & systems		£1000	£1000	£1000	£1000
Shared volunteer recruitment plan including publicity materials		£200	£100	£100	£100

Marketing & Communications					
Design and roll out of shared website	£5,000 to £15,000 (depending on specification chosen)				
Digital advertising	£800	£800	£800	£800	£800
Collaborative leaflet	£2,050				
Collaborative E-newsletter, with limited printed copies	c£30	c£30	c£30	c£30	c£30
On site table talkers		£100			
Annual Totals	£9,180 – £19,180	£4,130	£3,930	£3,930	£3,930

5. Monitoring, Governance and Review

5.1 Monitoring

At present, there is limited baseline performance data for the three organisations that comprise South Holland Industrial Heritage, with the exception of visitor numbers, and in the case of Moulton Mill, the annual financial performance of the catering and retail operations.

To monitor the progress of the business plan, a range of associated data will first need to be gathered to use to either directly or indirectly measure its success. Only once sufficient data has been collected, will it be possible to identify trends and amend work plans as appropriate.

On this basis, the following key performance indicators are proposed as priorities:

Visitors

- a) Visitor numbers, not just annually, but seasonally, weekly, etc;
- b) Visitor composition i.e. where practical, taking a record of the numbers of adults, and children visiting each day;
- c) Asking visitors if they have visited the other heritage attractions within the SHIH collaboration.
- d) Comment cards – whilst not a performance indicator as such, these are a useful and relatively easy way to gather feedback on the visitor experience (Task 3 in the action plan for ‘Audience development and visitor experience’ provides more detail on how this could be approached)

Volunteering

- e) Volunteer hours per volunteer, on monthly basis
- f) The variety (number) of different volunteer roles across SHIH on an annual basis

Marketing and communications

- g) Website statistics including number of unique visitors, and page views (these can be built into the shared website at its design stage)
- h) Social media statistics including the number of followers and other engagement created (again, these can be built into the design stage)

Commercial (whilst the business plan does not include commercial recommendations for each organisation these should help foster financial sustainability, and therefore, improving the recording of visitor and other customer income is recommended. It is also standard practice in the sector.

- i) As relevant, admissions income per person
- j) Where possible, spend per head and average transactional value

There a range of other of additional performance indicators that SHIH could measure, which are listed briefly below, but those above are considered the most important bearing in mind the constraints on resources available to SHIH. These include:

- Visitor dwell time (how long they are on site)
- Visitors’ postcode
- Whether visitors are new or repeat

- Visitor satisfaction and reason for visiting
- Volunteer satisfaction
- Amount of press/media coverage

5.2 Governance and Review

We don't recommend a formal governance structure for the collaboration, but rather ways of working and a range of collaborative work-streams.

It is recommended that progress in delivering the SHIH business plan is monitored on a quarterly basis through a meeting of all three organisations, with actions plans updated and amended as necessary.

6. Key risks and proposed mitigation

The greatest risks to South Holland Industrial Heritage in delivering this business plan are:

No.	Potential key risk	Proposed mitigation
1	The reliance on one or two key individuals within each organisation to maintain and champion the SHIH collaboration, which could falter if one of these people steps away	Approval of the proposed collaborative approach by the decision making boards of each respective organisation Better succession planning at each organisation for pivotal roles with respect to the SHIH collaboration
2	Reluctance from the IDB to open Pinchbeck Engine for at least one day at weekends, which will make it harder to market a consistent visitor offer across the three organisations at a key time for visitors	Support and sharing of best practice from Moulton Mill on how to develop and grow a volunteer offer
3	Failure to agree and develop common systems and processes for volunteering across all three organisations, for example, due to an unwillingness to share internal guidance and experience or resistance from existing volunteers to any changes needed	Shared understanding, mutual trust and ownership of the benefits of a common approach to volunteering
4	Failure to agree to a collaborative approach to marketing and communications, including a shared website, for example, due to concerns over dilution of each organisation's brand and reach or concerns over the financial implications	Shared understanding, mutual trust and ownership of the benefits of a collaborative approach Collective and equitable sharing of the costs associated and the resources needed to maintain such an approach. Making the most of external funding opportunities to cover associated costs of website set up

APPENDICES

Provided separately