

SUSSEX
PAST

Sussex Archaeological Society 2016 - 2020 Strategic Plan



Sussex Archaeological Society – Strategic Plan

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1. The Sussex Archaeological Society

The Sussex Archaeological Society (the Society) is the largest and one of the oldest county archaeological societies in the United Kingdom. The Society, established in 1846, has grown and developed into a multifaceted organisation which opens museums across Sussex, produces high quality archaeological and historical publications, supports a wide range of research initiatives and provides learning opportunities to many tens of thousands of schoolchildren and students.

The Society is a registered charity and a company limited by guarantee. The Society's charitable aims, as set out in its Memorandum and Articles, are:

'...to promote, encourage and foster the study of archaeology and history in all their branches (with special reference to the Counties of East and West Sussex).

The Society achieves these charitable aims and provides public benefit by:

- Opening six museums/historic properties in Sussex.
- Providing research facilities and support for the general public, students and specialist researchers.
- Publishing journals and books.
- Opening a reference library on the history and archaeology of Sussex in Lewes, and a specialist Roman Library at Fishbourne Roman Palace and a reference library at Michelham Priory.
- Providing a finds identification service.
- Running excavations and supporting archaeological fieldwork initiatives.
- Providing talks, conferences and guided walks on themes related to the archaeology and history of Sussex.
- Offering funding for outside research activities.
- Caring for a number of other historic properties (not currently open to the public).
- Managing three archaeological sites, namely the Long Man of Wilmington, a section of the Roman Road at Holtey and Brack Mount in Lewes.
- Working in partnership with local authorities and a wide network of professional partners to promote archaeology and history to the public.

The Society:

- Is a charity and a company limited by guarantee.
- Employs some 90 staff.
- Has an active membership with over 3000 members.
- Has a fully owned trading subsidiary – Sussex Past Trading Limited.

- Cares for nationally significant archaeological sites and monuments such as Fishbourne Roman Palace and the Long Man of Wilmington.
- Supports, and is supported by, over 300 volunteers in its museums, libraries, research projects and community excavations.
- Has over 800 members in our property based Friends groups.
- Has to generate funding for **all** of its ongoing costs from its own activities - through income generated by admissions to its properties, purchases in its shops and cafés, its commercial services and through legacies and donations.
- Supports heritage professionals and institutions in the fields of archaeology and museums.
- Has an extensive network of partner and stakeholder organisations.
- Supports enquiries on the archaeology and history of Sussex from around the world.
- Supports initiatives which protect and enhance the archaeology and history of Sussex.
- Provides professional guidance and leadership to a wide range of organisations and individuals on matters related to the history and archaeology of Sussex.

On an annual basis the Society:

- Welcomes over 160 000 people to its museums.
- Provides learning workshops for over 25 000 schoolchildren.
- Welcomes over 30 000 senior citizens to its museums
- Welcomes over 11 000 family members to its museums.
- Directly supports over 2000 detailed research enquiries relating to the archaeology and history of Sussex.
- Contributes to numerous sector specific appeals, campaigns and wider professional networks.

2. The Society's strategy development process

The trustees of the Society, together with its executive staff, have overseen the development of the Society's strategy. This has been achieved through the following process:

- **Spring 2014** - The Council of the Society established the aims of the strategy process.
- **Summer 2014** - The Council set up a strategy committee. The committee created the framework for the development of the strategy.
- **November 2014** - Two strategy days were held with senior staff and trustees. These identified the overarching strategic themes. These days were led by an external management consultant. The results were collated and disseminated to all participating staff and trustees.
- **January 2015** - A review of the emerging strategic themes was undertaken at the Society's annual staff conference. The feedback from this led to new proposals and a refinement of the emerging aims.
- **Spring 2015** - The CEO and trustees further refined the outline strategy.
- **June 2015** – The outline documentation detailing the draft strategy was presented to the Society's members at the annual AGM by the Chairman of the Finance Committee.
- **August 2015** – The headline strategy was disseminated to members using the Society's newsletter. Members were invited to submit comments and feedback.
- **November 2015** - Trustee, staff and member feedback was incorporated into the draft strategic plan.
- **December 2015** – The draft plan, prepared by the Chief Executive, was reviewed by Council and the Senior Management Team (SMT). Final feedback and comments were incorporated into the plan. The plan was voted on and formally approved by the board.
- **January 2016 – onwards** - The implementation phase of the Strategy Plan.

3. The Society 2000 -2010 – reviewing the past

In an organisation as rich in tradition as the Society current and future actions are inevitably influenced by the past. This section provides an overview of the historic elements which shaped, or continue to influence, present and future activity. It is necessary to review this timeframe as many of the factors affecting the current strategy are strongly influenced by long term legacy factors.

The 2010 review

In late 2010, the Council and the newly appointed CEO carried out a detailed review of the organisation.

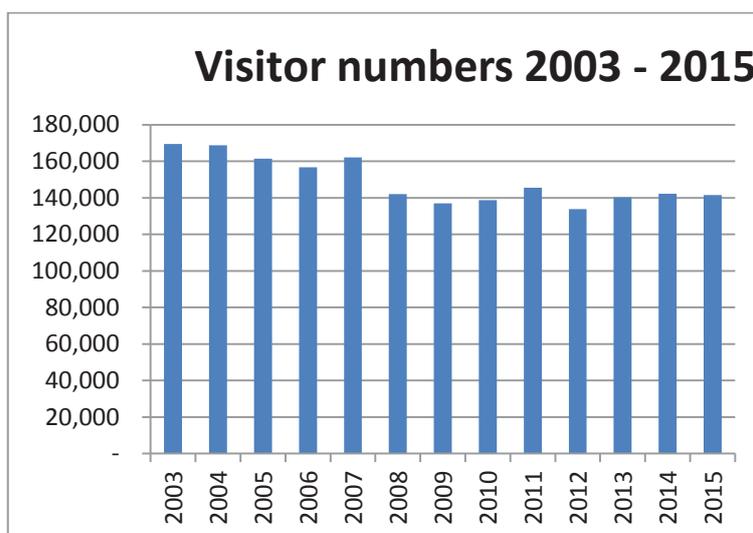
The main features which emerged from the review were that:

- The **business model** of the Society contained a number of structural challenges. The Society, with its six museums spread across the whole of Sussex, faced some very high fixed costs particularly in relation to its staffing, insurance, conservation and maintenance requirements. In 2010 staff costs represented 58% of total costs.
- The **size of the organisation** is problematic. It is not big enough to fully allow it to benefit from its size (like the National Trust) but it is of a size and complexity which requires it to fund and support technical, organisational, accounting and procedural features of a larger organisation.
- In terms of **sources of income** a number of issues were identified. The main income streams were, and still are, vulnerable to contingent factors, such as the weather and there were significant imbalances in the income streams themselves. 87% of income was derived from property related activities, the investment reserves produced 4% of income, membership produced another 3%, research produced 2% and other 3-4% came from other sources.
- There was almost no **externally guaranteed income**: unlike many other comparable organisations there was no ongoing form of central or local government support. The level of the reserves, set against the level of ongoing annual deficits, was a major concern. Further, there was no fundraising strategy designed to rebuild the reserves. In addition, the Society received almost no legacy income.
- Further to these issues, in late 2010, a new legacy deficit was identified to the Society by its local authority pension fund scheme managers. The scheme actuaries identified this deficit figure as £ 500 000; this being the Society's share of the overall deficit of the scheme. To address this imbalance the pension fund imposed significant new ongoing annual charges on all of the admitted organisations in the

scheme, including the Society. The Society's annual charge in 2011 was over £ 30 000 and this figure has continued to increase.

- There was an ongoing pattern of running **budget deficits**. In the period 1992 – 2012 there were only two years in which an operational financial surplus was recorded – these were in 2003 and 2004, at the height of the consumer boom.
- In the period 2006-2010 the total operating deficit of the Society was £ 1.18 million. The average annual deficit in this period was £ 236 000. In 2010 the operational deficit was £ 300 000. At this point the Society's reserves had a value of roughly £ 1 million; so this meant that if the pattern continued the Society would have run out of working capital in three years' time (i.e. 2014).
- A major contribution to the deficits was a decline in income caused by falling **visitor numbers**. These had fallen dramatically during the period 2005-2010. In the period 2003- 2007 there were an average of 163 000 visitors a year to the Society's museums. Visitor numbers fell by 20 000 in 2008. This was directly related to the economic crash; in this respect the Society's performance mirrored that of other comparable organisations. Unfortunately, the numbers did not bounce back after this major decline. In the period 2010-14, the annual average number of visitors was 143 000.
- In budgetary terms, this decline of 20 000 visitor equates to roughly £ 140 000 less annual income.

The visitor figures from 2003-15 are shown in the graph, below. The major decline in 2008 is clearly visible.



- In 2010 elements of the Society's **commercial activities** were performing unevenly. The most productive area, the shops, still generated a significant income stream. However, this area had also experienced a serious decline in turnover during the preceding period. Gross income had declined by £ 85 000 in the period 2004-10, on a turnover of £ 300 000. The fall in visitor numbers was the main, but not exclusive, cause of this decline. The catering function at Fishbourne Roman Palace had been outsourced, which led to further reduced income. In turn, the company which was awarded the outsourced catering contract subsequently went into insolvency and the catering had to be brought back in house. This was both disruptive and expensive. The weddings and functions business at Michelham Priory suffered from on-site management issues; this allied to the imposition of operating constraints imposed by the Planning Authority resulted in significantly reduced income. At Michelham Priory, the catering and function income which had a turnover of over £ 250 000 in 2005, and had generated a profit of £ 28 000, produced virtually no income in 2011. The weddings and functions in Lewes were making a financial contribution, but were facing ever increasing competition.

- There were many aspects of delivery within the **operational activities and customer services** which were of concern. Some of the maintenance standards were patchy; some of the standards in the catering and visitor services were extremely poor. Some of the museums displays were below the required professional standards and some of the interpretation was focused on a narrow band of learning styles.

- In some of these areas there was excellent practice but there were no systems or procedures for ensuring this excellence was applied across the organisation.

- There was a serious **lack of business focus** at all levels of the organisation; this was particularly problematic within the governance and leadership tiers of the Society.

- The model for **partnership working** was seriously underdeveloped.

- The **membership numbers** had been in gradual decline for a number of years.

- There was a significant **strategic vacuum** in the organisation. In 2009 the trustees had called an EGM and brought through a series of strategic proposals for membership consideration. These were primarily designed to stabilise the organisation by removing some of the costs and by enhancing some existing activities. Proposals were made to sell some of the historic properties and to use the income generated for conservation, research and educational activities. The proposals were rejected by the members and were not taken further. The

consequence was that no further radical strategies could be attempted for some time.

- There were a range of shortcomings within the **staffing of the organisation**. There were too few staff for the size of the workload and not enough staff with up to date business and sector specific skills. Alongside this observation it was recorded that there were many capable staff and volunteers who worked very hard and were passionately committed to supporting their property or service area. The organisation benefitted hugely from their skills, commitment and contribution. However, the overarching picture was that there were too few staff with the requisite skills in a number of key areas. Further, there had been a number of redundancies across the organisation in 2009 and this contributed to generally low staff morale.
- The **financial and information management systems** and the **IT infrastructure** were patchy. There were some areas of excellent practice, in others areas the systems were basic but functioned well and there were areas which did not support the organisation in the way such elements should do.
- The **governance structures** contained much good practice and activity but there were also some major shortcomings in a range of areas. In the governance reviews, carried out by trustees in early 2011, there was a strong shared sense that the governance was not functioning effectively. There was a view that the governance was reactive, bureaucratic and slower than it should be. There was also limited scrutiny of some important financial and operational performance areas. The concerns regarding the governance were shared across the organisation by staff and by some outside stakeholder groups. The various discussions, and actual attempts, to consider sale of some of the Society's properties had also lead to a breakdown of trust and good working relationships with the various Property Friends Groups and some sections of the membership.
- Some important **major capital projects** had been delivered in the period 2000-10. The projects helped to support important conservation, access, education and interpretation needs. They achieved a great deal and were substantially funded by external sources. Over five million pounds was raised between 1995 and 2005 to deliver these projects. This was a significant achievement and a record of which the organisation was justifiably proud. The projects often primarily addressed the needs of repairing the building envelopes and important curatorial needs of the collections; an example of this being the Collections Discovery centre at Fishbourne Roman Palace. The exception to this was the project at Lewes Castle where improvements to the visitor facilities did result in uplift in visitor numbers. Consequently, whilst

most of the capital projects often met important needs, they did not fundamentally alter the underlying negative financial performance of the Society. Further, with so many properties to support, some of them received more attention than others. Some, notably Michelham Priory, were in significant need of attention by 2010.

- Many significant **conservation** needs had been addressed by the capital projects but two major problems remained. These were the slow but definite deterioration of the mosaics at Fishbourne Roman Place and the slow but progressive loss of the moat at Michelham Priory due to silt deposition and vegetative encroachment. There were two other outstanding areas. These were the roofing problems at Barbican House Museum and at Marlipins Museum, and the fire compartmentalisation works at Anne of Cleves House Museum and Barbican House Museum.
- The organisation had also had a long culture of **internal divisions**. This disabled cross organisational approaches and actions and it undermined the collective effectiveness of the organisation.

Summary

In 2010 the Society could be characterised as an organisation which achieved a great deal with limited resources. Like many heritage bodies it was rich in assets and poor in cash. Fundamentally, it was also clear that it was an organisation with significant financial and structural challenges.

The decline in business performance was primarily attributable to the economic downturn, however the severity of the impact and the inability of the organisation to address this were strongly related to its underlying business model and structural shortcomings.

Notwithstanding the above comments, there were many areas of positive achievement. Some of the properties were supporting their audiences to a very high standard, the publishing and research elements were continuing to deliver high quality outputs, the membership events and activities were of an excellent standard, important capital and revenue projects were being delivered and many staff, trustees and volunteers were working well on a collaborative and professional basis.

Therefore there were positive elements to build a new future on.

The section below details the ways in which the organisation built on these elements, addressed the problems and implemented new actions. The outcomes of this new work, and the long term implications are also reviewed, particularly where they influence the future strategy.

4. The strategy 2010-2015 – *identifying future needs.*

In 2010 it was clear that the organisation was not in a position to develop and implement an overarching strategy. So a series of operational and business plans were developed and put in place to address the most serious financial and operational issues.

The first action was to address the financial challenge. A new business development plan was put in place in early 2011. This covered every major organisational activity and proposed a series of actions for future income generation and cost reduction. The plan covered admissions income, membership sales, donations, legacies, Friends fundraising, commercial activities, marketing, partnerships, project development, volunteering, and the management of the investments.

These new business actions were formalised in a series of business planning documents. These were shared with the Society's staff, its members and its stakeholder groups such as the Society's Vice Presidents and the Property based Friends groups.

Externally funded management consultants were brought to work with the Society's staff and trustees to help develop new leadership models. A series of themed visioning days involving trustees and staff were held across the Society's properties. These activities enabled new more business-like approaches to be developed at all levels of the organisation and for the business actions to become embedded in organisational practice.

Some of the activities and their outcomes are detailed in the following section.

Museum and Property Management

The properties/museums had traditionally been managed as separate entities. However, this makes their operational management, their marketing and their promotion complex and challenging. Over the last period the properties have been treated as a collective entity and this has increased the efficiency of the business modelling and management. This method provides more opportunities for joined up fundraising and project management. An example of this has been where a major society funder, the Monument Trust (a Sainsbury Family Trust) who supported major capital and revenue works at Anne of Cleves House Museum over a number of years have now agreed to make a major investment in the Michelham Priory moat restoration project. In turn, this has led to the Society being invited to bid for an interpretation project at Fishbourne Roman Palace by another Sainsbury Family Trust. This collective managerial approach therefore directly supports the cross organisational requirements.

a. Audience development projects 2010-2015

At **Michelham Priory** a number of new developments were undertaken during 2012-2014. These included the refurbishment of the Elizabethan Barn, the major redevelopment of the café, the refurbishment of the shop, new visitor welcome facilities in the medieval gatehouse, new interpretation in the main historic house and gatehouse and the creation of a new playground. The costs of these works, which was in the region of £ 300 000, was fully met by very generous support from the Friends of Michelham Priory, private donations and practical and technical support given by the team from the local Waitrose in Hailsham . These revenue and capital works were matched by a major restructuring of the staff team.

These works have resulted in a significant uplift of the visitor experience and have generated significantly more income. However, the site is still not achieving a balanced budget and further work is required to make the overall business model work better. A substantial review of all aspects of Michelham Priory is currently underway and this will result in a series of recommendations for the optimal future of the site in early 2016. It is clear that a series of further developments, focused on the environmental and rural heritage will be central to enabling Michelham to achieve its potential. These initiatives are detailed in the development projects plan (pages 32 - 38 of this document).

At **Anne of Cleves House Museum** a new café, tea garden, disabled access facilities, new toilets, a new historic garden and new displays were put in place during 2014/15. These works were fully funded by the Monument Trust, The JP Getty Trusty, the Biffa Environmental Trust, private donors and the Friends of Anne of Cleves House. These works were informed by the development of new **audience development plans** within the business modelling of the organisation. In 2011 it became clear that the visitor numbers at Anne of Cleves House Museum were going to be adversely effected by the introduction of the new National Curriculum. This was going to result in a loss of over 15% of the visitors. Consequently, a detailed audience review was undertaken. This identified the key audiences which could be developed. The new projects were therefore specifically designed to incentivise and support these new audiences. In particular, increasing the number of adults, families and senior citizens was prioritised and all of the works were designed to support this aim. In 2015 this resulted in the highest level of visitor income in the history of the museum. There is still more work to do on this front but this has demonstrated that the model of linking the investment to clearly defined audience and business development projects is core to all future project development and modelling.

These new property initiatives had to sit alongside the completion of major ongoing projects. During 2011 and 2012 two major outstanding capital projects at Lewes Castle and Anne of Cleves House were successfully completed. This took a significant amount of time from a number of key managerial staff. The problems arising from managing these projects lead to a clearly identified need for a formal project development and management

framework for the Society. This was developed and brought in alongside a number of other new management and financial control procedures.

Some of the revenue projects delivered in the Society's properties have highlighted the effectiveness of multifaceted audience centred initiatives. An excellent example of this was the **Battle of Lewes Project**, (2010-14) funded by the Heritage Lottery Fund (HLF). It had an excellent blend of elements which encouraged and supported a range of audiences and increased the property related income. It had strong academic and research elements, it involved a range of property based events, it developed new education resources, it had a strong online presence, it involved substantial volunteer input into creative displays and it generated products which could be sold in the shop.

During 2016-2018 a new initiative, funded by the HLF and run in partnership with the RNIB, will build on elements of this approach by addressing the access needs of the audiences at Lewes Castle. These types of audience centred projects, which have a financial benefit, will be prioritised the forward project planning.

For most major museums **temporary exhibitions** are an important means of maintaining visitor numbers and in developing new audiences. Proper exhibition spaces allow museums to host nationally significant travelling exhibitions and to create temporary exhibitions from their own collections. The Society has no such industry standard facilities in any of its properties. The development of such facilities in any of the future major capital bids will be prioritised.

Notwithstanding this situation, the staff teams at Fishbourne Roman Palace, Lewes Castle and Michelham Priory have put on a wide range of high quality small-scale temporary exhibitions over the last few years. Some of these exhibitions have been designed to travel from one Society property to another. This type of enterprising approach, which draws in visitors but also joins up the organisation, will be developed further in the future display planning.

Currently, a great deal of work is carried out on audience segmentation and analysis. This is linked in with the interpretation developments and marketing initiatives. An example of this has been the demographic analysis carried out on the age profiles of our audiences. This suggested that as senior citizens are the group whose average living standards have risen the most since the crash of 2008 that initiatives should be directed to supporting this particular audience. We have responded to this through the development of new and enhanced cafes, with seating throughout our museums, by providing higher level information in gallery booklets and a raft of other similar measures. In 2015 the number of senior citizens visiting our properties rose by 2000.

Audience development, particularly through database generation, segmentation, new visitor facilities and targeted promotion will be at the centre of the Society's strategy to

increase its visitor numbers and income over the next five years. Currently, the Society is at a very early stage with this work so there is a great deal of progress to be made.

b. Commercial functions

The commercial needs of the organisation have been robustly addressed over the last five years. Some examples of the current and future initiatives are given below.

In 2012 at Michelham Priory and Fishbourne Roman Palace the **catering** was taken back in house. At Anne of Cleves House a new café and tea garden were established in 2014. The cafés at Michelham Priory and Fishbourne Roman Palace have been significantly refurbished over the last few years, new staff have been employed and new menus have been developed. The refurbishment works have been funded by outside bodies and our Friends groups and they have greatly enhanced the visitor's experience of our catering. The effects of these actions are clear in the income generated. In 2011 catering income was £ 20 000. At the end of 2015 catering income was in the region of £ 280 000. In 2016 it is predicted to be over £ 400 000.

The catering and retail facilities are not just sources of income; they are also a critical part of the whole visitor experience. It is now a standard customer expectation that heritage sites will provide high quality shops and cafes. The menus, the staff and the catering environment are all key parts of the overall visitor experience. There has been a clear understanding and focus on this in the development of these new facilities. Very positive feedback is regularly received about the Society's catering and this is reflected in the online reviews of our properties.

Despite the quality of the catering, the turnover has not always been matched by significantly increased profits and this is an area which will be subject to further review and actions in the next phase of the Society's business development.

At Michelham Priory a very intensive process of working with the local community, local councillors, the planning authority and business consultants resulted in the Society being awarded planning permission for 25 evening functions at Michelham Priory. This process was accompanied by a major revamping of the café and works to the Elizabethan Barn which is at the centre of the delivery of the weddings and functions business. In 2011 the barn was in not in a fit condition to support the commercial business. It was gloomy, dirty, had a malfunctioning sound system, a badly constructed internal bar area and it had a number of electrical and structural problems. New glass doors were introduced, a new high quality sound system was installed, new handmade Italian drapes were installed, new lights, a new bar and new electrical works were added. The whole customer experience was uplifted to the required commercial level. In 2010 this area produced no income, in 2014 it generated almost £ 100 000 of income.

In 2011 a retail consultant was brought in to advise the Society on how to develop its shops. The initial funding for this was provided by external sources and our Friends groups. This technical input was matched by the physical refurbishment of the shop at Anne of Cleves Museum and the major refurbishment of the shop at Michelham Priory in 2012/13. These actions have generated a higher spend per visitor, over the recent period but have not increased the overall headline income. Interestingly, in both 2010 and 2014, the retail income was in the region of £ 220 000. So, in effect these actions have arrested the decline and stabilised the income levels. This is a platform on which future actions can be built.

It is intended to revamp the shop at Barbican House Museum as part of a major capital project on this site. Given the high street location of the museum this should have very positive financial benefits. Alongside the physical actions another aim will be to drive up the efficiency of the retail management systems. Central to this will be to use the EPOS tills more effectively to manage stock and to drive up sales over the next five years.

The net effects of all of these commercially focused actions are demonstrated in the headline level income. In 2011 the income derived from commercial activities was just over £ 266 000, in 2015 was in the region of £ 570 000.

c. Property conservation projects

Two major property conservation projects have been addressed over the last two years. The first was the water damage to the mosaics at Fishbourne Roman Palace. This involved the relocation of the leaking water main adjacent to the mosaics at the Palace and the clearance of an overgrown nearby stream. These works, costing over £ 500 000 were fully funded by outside bodies. Previously, large areas of the mosaics flooded every year and this was leading to ongoing significant conservation problems. These works have substantially resolved the problem and stabilised the conservation environment.

The second major conservation project which is being undertaken is the de-silting of the moat at Michelham Priory and the removal of the encroaching vegetative material. The moat, at a mile long, is the longest continual water filled mediaeval moat in Britain. It has been gradually silting up over the last twenty five years and is being choked by an increasing invasive growth of aquatic plants. The loss of available water in the moat has archaeological and environmental ramifications. It has also made Michelham's wonderful watermill almost inoperable. Large amounts of vegetation were removed in 2013 and 2014 to prevent an environmental crisis, but the fundamental problem remains. Following on from a successful fundraising drive in 2015, £ 150 000 was raised to start the process of the restoration of the moat. Further fundraising will be carried out for this project over the next period.

Attention has also been focused on the fire risk within the Society's properties. The risks are primarily to people in the properties (staff, volunteers and visitors) and the buildings themselves. The examples of Windsor Castle, Uppark House and Clandon Park show the

level of destruction which can be caused by fire in historic properties. Over the last two years the Society has brought in experts from English Heritage and specialist fire heritage consultants to review the current risks and the Society's mitigations measures. Remedial actions have already been undertaken at Michelham Priory and a major fire compartmentalisation project will be undertaken at Anne of Cleves House Museum in 2016.

d. **Staffing**

A major **staffing re-structure** was implemented across the organisation in 2013/14. This met clearly defined financial and organisational needs. Firstly, headline level staffing costs were significantly reduced and the new structures also better supported the organisation's operational needs. The creation of brand new posts enabled more focus to be placed on income generating activities and visitor facing services.

One of the challenges faced by charities in the heritage sector is in securing support for **ongoing staffing costs**. Invariably funding bodies do not wish to support staff costs once projects have been completed. One way of addressing this is by developing projects which provide funding for staff and volunteers. This need has been specifically addressed through a new Heritage Lottery Funded project which will be delivered in partnership with East Sussex County Council (ESCC) during 2016 and 2017. This **Skills for the Future** (SFF) project will provide funding for salaries and resources for up to eight new staff in the organisation. This type of model of staff funded projects will be a part of the forward strategy of the Society. It addresses a key need, that of strengthening the staffing resource, without incurring new costs and creating new long term commitments .

Alongside the changes in staff numbers and staff roles, a **new senior management team (SMT)** has been established to ensure much more cohesive cross organisational management. Another new initiative has been the establishment of cross organisational **staff conferences**. These take place annually, every January, and move around the Society's major properties. Given that the Society has around 100 staff, spread across seven separate sites, these types of initiatives are important in the creation of cross organisational cohesion.

New property based **newsletters**, which are shared across the organisation, have also helped to strengthen a common sense of purpose. This cross organisational communication will be further developed over the next period.

Many new **personnel systems, policies and procedures** have been developed. These actions are supported and guided by a new Personnel Committee which has been developed within the Society's governance structures.

e. Volunteering

The Society benefits hugely from its many hundreds of **volunteers**. They support work throughout all layers of the organisation. Trustees volunteer their time and expertise and so an appreciation of the value and importance of volunteering is understood at the highest level of the Society. Volunteers play a leading role in areas such as the Library at Barbican House, running the shop at Michelham Priory, opening Marlipins museum to the public, supporting important elements of our financial procedures, running events, helping produce displays, cataloguing and documenting the collections, supporting the maintenance of our buildings and gardens, offering interpretation and guided tours at Michelham Priory and in helping the work in our new café at Anne of Cleves House Museum.

More structure and support is needed for the volunteers and this will be incorporated into the strategy plan. One of the funded projects in 2016/17 will provide an opportunity to review and develop some more fit for purpose procedures and documentation for the Society's volunteering.

External funding will be sought in the latter part of the strategy period for funding for a volunteer co-ordinator and the resources to support volunteer development and training.

f. Membership

Given the importance of the Society's **membership**, action to address the decline in membership numbers has been a priority during the last five years. In 2011 a new membership drive was initiated by the CEO, Membership Secretary and the property managers. This involved much more active marketing of the Society's membership by the Properties. This has had a significant positive effect in terms of arresting the decline in members and in increasing membership use of the properties/museums.

In 2010 there were 2400 members, by mid-2015 this had increased to 3200. In 2010 a total of 50 new memberships were sold at the Society's properties. In 2014 there were over 200 sold. In 2010 there were 1400 member visits to the Society's museums/properties, by the end of 2015 this had reached 10 000. More work is now being undertaken to maximise the fundraising potential arising out of this new membership growth and engagement.

Significant credit for the membership increase goes to the front of house staff who have actively supported the membership drive.

In order to build a new relationship between the members and the trustees, the CEO, Chairman and Membership Secretary have organised a series of **annual membership meetings**. These are held across the Society's properties at the beginning of each year. Members are able to ask questions about any area of the Society's activities. All the questions and the answers are put up on the members section of Society's website. This is designed to ensure that an open and supportive relationship is enabled between these key

parts of the organisation. Alongside the printed membership newsletter, *Sussex Past and Present*, the Membership Secretary has developed an e-newsletter which provides very informative updates to members.

Further work needs to be undertaken to ensure that the retention rate of members is increased; alongside this, new fundraising appeals addressed specifically to members will aim to further benefit the organisation.

g. Governance

In 2011 a thorough **review of the governance** was undertaken by trustees and the CEO. This review resulted in a new set of governance structures being developed. The new structure was put in place in 2013. Although this successfully strengthened the role of the main trustee committee (the Council) it did not adequately support the work of the sub-committees and working groups. In 2014 a new structure was brought through and this has resulted in the development of a number of new standing committees and working groups. These groups have had success in moving forward issues such as the development of a new governance code for the organisation, financial oversight, the development of the Society's strategy and the review of property related matters.

The governance of the Society has shown real progress and development, particularly since the AGM in 2015. It is planned to build on this progress over the next period. Raising the standard of leadership and governance is a key organisational target. The new Governance committee has not only overseen the production of a **Code of Governance** it has also established a clear timetable for further governance actions; these will be incorporated into the strategic plan.

A further related area of review and development will be a consideration of the amendment of the Society's **Memorandum and Articles**. The Society's President has undertaken a great deal of background work on this task over the last period and the platform for the updating of this part of the constitution has been created. This will take place in the latter part of the strategy period.

The Society has a huge wealth of skills and experience in archaeology, history, research and publishing within its governance structures, particularly within its Vice Presidents. This expertise is greatly supportive of the Society's activities and will continue to play a role in the future wellbeing and development of the organisation.

h. Marketing

In 2010 it was identified that the Society's **marketing** was not meeting the needs of the organisation. The earlier restructure in 2009 meant that the central marketing officer for the organisation was spending most of their time undertaking property based administrative work rather than promoting the organisation. In a business which derived almost 90% of its

income from property based activities this had serious consequences. In 2011 the administrative and marketing roles were separated and new staff with the necessary commercial experience were recruited.

The Society's website was completely re-designed, the Society's logo was refreshed and a new branding exercise was undertaken. A uniform was introduced for all visitor facing staff and the standard of visitor facing elements of the Society's properties was significantly enhanced. The success of this work has been evidenced in the repeated awarding of TripAdvisor Certificates of Excellence for the Society's main properties. New and successful promotional initiatives such as partnerships with American Express and the selling of Groupon vouchers have shown the types of initiatives needed for the future development of this side of the business.

There are a number of areas where the marketing and promotional initiatives need to be strengthened. These are in the stronger use of **online marketing**, more effective use of social media and also through more targeted fundraising enabled by careful database development. The funding for extra staff to support this area will be sought from external funding bodies. Given the rate of change in marketing, the actions in the strategy plan will only focus on the first two years of the five year strategy period. After this new actions will be developed on an ongoing basis.

Some essential physical upgrades of the Society's IT have taken place during 2015 and a new support arrangement has been put in place with outside providers supporting the Society's IT needs. This has significantly improved the speed and efficiency of the support service arrangements. During the next period the Society's IT requirements will be systematically addressed in a formal review and action plan. The first stage of this will be to ensure that the Society takes a range of measures to ensure its cyber security is enhanced. The second stage will be to drive forward the use of IT within the Society's work as well as its public facing interpretation and engagement.

i. Fundraising

Over £ 500 000 has been raised and invested over the last five years. A new phase of fundraising in 2015 has raised over £ 300 000 for the next year/eighteen months for a range of capital and revenue projects. It is envisaged that further more significant funds will have to be raised for major capital and audience development projects at Fishbourne Roman Palace, Lewes Castle Michelham Priory and Marlipins Museum. The headline details of the Society's projects in the period 2016 – 2021 are set out in pages 32-38.

In total the proposed projects for the period 2016-2020 have a collective value of £ 3- 4 million pounds. So, fundraising and project management will form a significant part of the forward activity.

The **fundraising** for these projects focuses on the audience development and commercial needs of the organisation. However, it does not meet the requirement to rebuild the Society's reserves and to ensure the organisation can maintain a strong cash flow. The CEO and Chairman have established a working group specifically to address this area and this will be an important part of future management activity.

Over time the activities conducted under this type of fundraising will result in increased legacy income, more philanthropic giving and an increased pattern of contributions made through ongoing appeals. The benefits of this type of fundraising are long term and will not start to be felt until the later part of the strategy period.

An example of important role of **individual donors** can be seen through the generous ongoing support for the running costs of the Priest House. An individual donor has covered these costs for a three year period. This amounts to £ 45 000 of support. This same donor has also funded the refurbishment works of the shop at Michelham Priory, the installation of the new fire doors at Anne of Cleves House Museum, the match funding of the South Downs books and other valuable interpretation and equipment costs. This generosity is of huge value to the Society and efforts will be made to identify and work with a number of such donors.

j. Research

The Society has a long tradition of supporting a wide range of **research** initiatives and some of these are outlined below.

The overall scale of the Society's support for research initiatives is very impressive. Every year some 2000 detailed research enquiries are supported, many of these involve direct face to face support from the Society's curatorial and research staff.

The Society also supports the nationally important **Portable Antiquities Scheme**, which is managed by the British Museum. It does this through the hosting of the Sussex Finds Liaison Officer (FLO) whose work supports public finds identification needs.

The Society also supports research libraries at three of its museums. These are available for members and non-members alike.

The Society also has a long publishing tradition and has produced a county archaeological and historical journal for over one hundred and fifty years. A new initiative over the last period involved the publication of a series of three guidebooks to the new South Downs National park. These books cover the archaeology, natural history and geology of the park. New books on the churches and vernacular buildings of the park are being developed for the next period. These books have been generously funded by the park authority and a

private donor. They have raised the profile of the Society and they have also generated sales income.

The Society also collects archaeological, historical and printed material, guided by its Collections Policies and Procedures. Recently the Society's members helped to raise the funds necessary to purchase some important early watercolours depicting the Society's properties and a number of local churches. These new acquisitions strengthen existing collections held by the Society.

In 2013/14 the Society was awarded funding to purchase some outstanding Bronze Age artefacts, known as the Near Lewes Hoard. This material was not only purchased and conserved, but alongside this an innovative partnership was formed with Brighton University to display the material, both physically and on-line. This project involved the Society's FLO as well as the curatorial and learning staff. This type of model based involving our research and learning teams will be built on over the next period.

The Society's authority and capability as a research organisation has also been important in providing a foundation for the major displays and public events run at the Society's properties. A good example of this work was the Battle of Lewes Project. This initiative, led by our Learning team in Lewes, celebrated a significant historical event which took place in Lewes just over 750 years ago. The project generated an excellent community engagement programme, exciting public events, learning sessions for local schools, imaginative outdoor presentations and a high quality conference. All of the activities were informed and underpinned by the Society's high research standards. These types of initiatives, with a strong research basis, will continue to be developed over the next period and are an important strand in our future project planning and development.

One of the major issues facing the Society, and other archaeological and museums organisations, is the issue of **archaeological storage**. The Society is collaborating with other museums and archaeological professionals to address this increasingly problematic area. The development of the industry standard store within the Collections Discovery Centre at Fishbourne Roman Palace provides high quality storage for the Society currently and it means that the Society is well placed to be at the centre of future regional initiatives in this area. This long term option is facilitated by the original foresight incorporated into the building design where more bays can be added to the existing store.

The conservation laboratory in the Collections Discovery Centre(CDC) offers further research and income opportunities. Funding has already been drawn down from the Arts Council to showcase this resource to other museums. This facility supports the Society's own conservation needs and income is also derived from the commercial conservation services offered through the CDC. Further expansion of this activity is envisaged in the future strategy.

Another significant initiative which highlights the linkage between our research, our learning and our public facing work has been the **spoil heap excavations at Fishbourne Roman Palace**. In 2013 the Society was awarded £ 10 000 by the Heritage Lottery Fund to enable a community excavation of the 1960's spoil heaps at the Roman Palace. The curatorial and learning teams at the Roman Palace organised an exciting series of activities to coincide with National Archaeology week. Over a thousand members of the public were able to participate directly in the excavations for free. This public excavation opportunity has been repeated over the last two years and will be supported in the future.

Future initiatives of the types detailed above will be delivered during the strategy period. These new initiatives will sit alongside the Society's ongoing research and publishing activities.

k. Partnerships

Partnerships are central to the effective professional working of heritage organisations. In 2010 this area was relatively underdeveloped for an organisation of the size of the Society. Nevertheless, the Society had developed some strong partnerships with a number of organisations. One of the principal partnerships is with the British Museum which provides funding for the Finds Liaison Officer. Another important partnership was the funded arrangement with Chichester District Council for collections management work at the Collections Discovery Centre at Fishbourne Roman Palace. Another long standing multifaceted partnership was with East Sussex County Council (ESCC) via the East Sussex Archaeology and Museum Partnership (ESAMP). There was also a financially advantageous arrangement with English Heritage which enabled reduced price reciprocal admissions arrangements.

Where possible these partnerships have been continued and consolidated.

After lengthy negotiations the arrangement with Chichester District Council has now been formalised in a 60 year agreement. This provides a guaranteed strand of income for Fishbourne Roman Place for the long term. The cutbacks to government funding to ESCC resulted in the loss of ESAMP as a formal partner. However, much of the valuable elements of the work undertaken under this partnership have been continued on a voluntary basis. ESCC and the HLF have generously supported the Society in taking over substantial grant which has previously been awarded to ESAMP. The funding for this project, which fully comes under the auspices of the Society, will enable the continuation of some valuable parts of the previous work.

The partnership arrangement with English Heritage is continuing.

There are a wide range of short and long term partnerships as well as mutually advantageous working arrangements. The Society will proactively seek to develop this activity as an important part of its forward strategy.

The Society has a wide set of relationships with a variety of stakeholder organisations and individuals. These groups include commercial organisations, inspection bodies, neighbours and a number of local authorities. Their influence on the organisation ranges from being relatively minor through to quite significant. The organisation now has a much more proactive attitude to ensuring that these stakeholder arrangements are positively reviewed and supported and that they form an important part of our future strategic planning.

I. Benchmarking

The Society uses benchmarking with other comparable organisations to review the effectiveness of its performance. In 2013 the CEO and the Chairman of Council worked with the trustees and senior staff of the Dorset Natural History and Archaeological Society (DNHAS). The DNHAS is very comparable to the Society. This professional exchange involved reciprocal visits and extensive data sharing. This process was fully funded by the Association for Independent Museums.

Exchange of performance data regularly takes place with a number of local museums and historic properties. This benchmarking and collaboration with other comparable organisations helps in the analysis of the Society's business performance and feeds directly into the future audience development planning.

Summary

The broad collective result of the actions undertaken in the period 2010 - 2015 has been to improve the underlying **business performance** of the Society. This has taken place against a challenging economic backdrop. Many of the Society's key visitor audiences are ones who have been particularly hard hit in the recession. Further, as average incomes declined between 2008-15 most visitors have been more careful with their secondary spend in the Society's shops and cafés. This even goes down to the level of retail income derived from school visits. Further, as a consequence of government cuts to public sector bodies, many of these now compete directly with the Society for funds from grant giving bodies.

The recession has had other direct impacts caused by macroeconomic factors. The long period of low interest rates, and the use of quantitative easing, have both significantly depressed the yield return of gilts. In turn, this has increased significantly the Society's overall deficit within its County Council administered pension scheme.

So although the wide-ranging set of actions undertaken has improved the overall business performance of the Society new costs and challenges have arisen. The sum of these factors can be seen in the financial performance table shown below.

The financial position

The table below shows the **underlying financial operating** position in 2010 and at the end of 2015. The table presents the 'cash' position – that is excluding depreciation. It also excludes

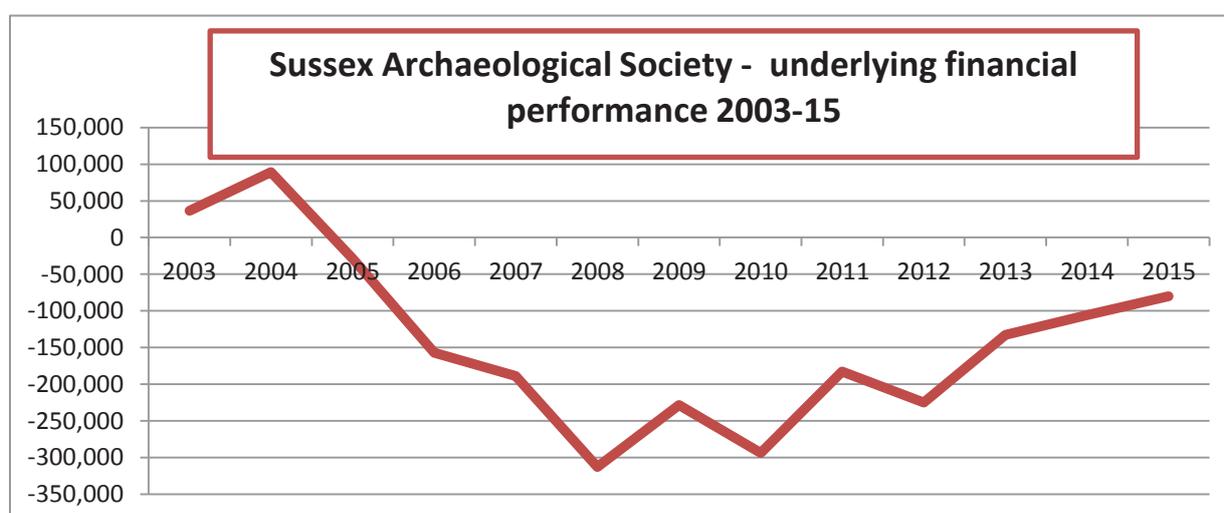
one off major items, such as legacies. The figures for the divisions are given after the allocation of central costs. The table does not show all costs and income but focuses on the main areas.

Underlying financial performance 2010 and 2015			
Area	2015	2010	Change
Membership	£ 12 000	£ 7 000	£ 5 000
Research	-£ 60 000	-£ 79 000	£ 19 000 ⁽¹⁾
Museums/Properties	£ - 30 000	-£ 200 000	£ 170 000
Income from investments	£ 18 000	£ 61 000	-£ 43 000
Year-end position	-£ 90 000	-£ 270 000	£ 180 000 ⁽²⁾

1. In 2011 following on from a review of the central cost allocations, over £ 25 000 of costs were taken out of Research and allocated to Museums/Properties. So, on a like for like basis, the losses in the Research area in 2015 would be £ 85 000 as opposed to the £ 60 000 shown in the table above. Consequently, the improvement in the museums/ properties is greater than shown.

2. It is important to also note that there are £ 45 000 of new legacy pensions costs in 2015 which did not exist in 2010. So progress in the overall year end position would have been greater but for this new cost.

The financial performance, over time, can be seen by looking at the graph, below:



The table and the graph clearly demonstrate the results of the major restructuring and commercial actions undertaken in the museums/properties over the last five years. The museums/properties were responsible for the majority of the operating deficits in 2010, so they been the centre of the strategy for the last five years. The strategy has made considerable progress but more still needs to be achieved.

There has been very real progress across a wide range of areas within the Society and the original financial problems identified in 2010 have mostly been addressed. Unfortunately, the financial gains made by the Society have been, and continue to be, eroded by actions undertaken by respective governments. Changes to **pensions legislation** and the introduction of the **living wage** in 2016 mean that the organisation will have to pick up roughly £ 100 000 of new staff related costs in 2016 compared to 2010. Mitigation relief for some of these new costs to business has been provided. Not for profit organisations and charities, such as the Society, received no relief.

These new costs, allied to the lower admissions levels and continuing economic cutbacks, meant that the financial performance of the Society over the next few years remain a matter of serious concern, particularly with regard to the Society's cash flow. The budget for the strategy period is given on page 39 of this document.

Reviewing future options

The Society is currently committed to continuing to supporting all of its current activities. However, if the business and structural measures do not succeed in resolving the financial position then a range of measures, including closure and possible sale of properties, will have to be considered. The Society does have other means of generating money to rebuild its reserves, particularly through the opportunity to develop housing on land at Fishbourne Roman Palace. So, if the current business model does not succeed, there are a range of cost saving and income generating options which can be reviewed by the board and brought through to members for consideration. Further, there are areas which have not been subject to remedial actions and these can be considered if the performance does not improve.

Reviewing the business performance, cash flow and future options will be at the centre of the governance and management decision making over the next few years.

The 2016-2020 strategy is designed to ensure that the Society has control over its decisions and that a long term viable future for the whole organisation is built.

The Society's strategy, its aims for the future and the concrete actions which will be taken are set out in the following sections.

5. The strategy 2016 – 2020 – the foundations

Respecting our traditions and values

The Society is proud of its traditions, the work it undertakes and the role it has played in Sussex for over the last 170 years. The strategy embraces these traditions and creates foundations which will support the Society for the next 170 years.

Before detailing the strategy itself it is important to return to two key areas which are integral to everything the Society does and which run through all of its activities. These are Learning and Research.

Learning

Learning is at the core of the Society. It was one of the founding imperatives of the organisation and it is the activity which reaches through every area of the Society. It is core to the Society's research, study, formal and informal teaching, displays and interpretation, drama, craft, engagement and play. It is the core way in which the Society achieves its main charitable purpose and helps the Society achieve its public benefit requirements.

Learning takes place in our outstanding library, through our journals, our books, through our museum displays, through our finds liaison service, at our front desks, in our learning workshops, at our excellent conferences, in our cafes, on-line and in many other ways.

One of the things which makes the Society unique is the diversity and the richness of its constituent parts. The Society has a wide but geographically defined presence. It owns and opens museums which contain artefacts and material culture from the Palaeolithic to the present. It has research, publishing and membership traditions which are widely known and respected. Crucially, the Society has a strong defined sense of place and belonging in its local and national communities, derived from its presence and activities over the last 170 years.

The learning opportunity represented by this collective resource is second to none.

The current success in this area will be developed. The Society needs to embrace the use of methods and techniques which support the full range of learning styles and to reflect this in its policies and in its practices. Many of the current museum displays and interpretation rely on a limited number and type of approaches. This aspect of the Society's work will be significantly developed over the next period and learning will be prioritised throughout all of our aims and activities. This will impact on audience development, staff and volunteer training and development, publications, our online presence, our marketing and all of our commercial activities.

Research

Research standards and practices will run through all activities of the Society.

Archaeological and historical study are key activities and processes which inform all areas of our work from our learning programmes, our displays, our public engagement, our events and our marketing and promotion. The Society's research work is not just comprised of the activities carried out. It is a part of the ways in which the Society identifies itself, the standards it sets, the ways in which it engages with archaeological material and historical evidence and it also informs all of the discourses which the organisations holds with all of its audiences. Looking ahead, the Society's research capabilities will be very important in helping to inform and support the design and delivery of some major audience-focused property developments in the period 2016-2020, such as the proposed outdoor interpretation centre at Fishbourne Roman Palace and the potential crannog development at Michelham Priory.

Our success as an organisation will be seen in the ways in which we respect our core traditions and make the current activities and practices relevant to our contemporary communities. We need to make everything we do exemplars of best professional practice in all of the areas we operate in.

The strategy

The overarching purpose of the strategy is to ensure:

The sustainable long term management of the Society as the leading body in learning, research, publication and public engagement with regard to the archaeology and history of Sussex.

Sustainability applies to the financial position of the Society, the curation of the collections and historic properties; it relates to all stakeholders (the public, staff, trustees, members, volunteers, partners, Friends and neighbours) and considers our environmental impact.

6. The Society's six core aims – 2016 - 2020

The strategy for 2016 - 2020 is founded on the Society's six **core aims**.

These aims have been developed over the last year by the stakeholders involved in the Society's strategy development process.

The aims break down broadly into three groups; these are colour coded to highlight their nature.

● Some of the aims are more **aspirational** in nature. - e.g. – to become an outstanding learning organisation or to consolidate and strengthen relationships with Friends Groups...etc.

● Some are **process** focused – e.g. – update collecting policies or implementing efficient project management processes.

● Some are **activity** focused – e.g. developing a young archaeologists membership or achieving accreditation

Some of these categorisations overlap – so the primary element of each aim is the one highlighted.

The Sussex Archaeological Society's **six main strategic aims** for 2016-2020 are:

Aim 1. To develop, support and engage with our audiences

- Become an outstanding learning organisation. Enhance all elements of our learning-through our displays, educational services, our publications, our library, our conferences, courses and events.
- Continue to enhance physical and intellectual access across all of our sites and activities.
- Create audience development plans for all of our museums and put the visitor experience at the centre of all planning activities.
- Review and analyse our visitor's experiences through internal and external surveys, benchmarking and evaluation processes.
- Enhance our research and publishing activities
- Develop on-line access to our collections and museums
- Strengthen the on-line access to our libraries
- Develop new education packages to meet the needs of the National Curriculum
- Develop a young archaeologist's membership for the Society.
- Develop and implement a strategy to broaden and diversify our audiences
- Create new interpretation resources which meet a wide range of learning styles

Aim 2. To care for and sustain our collections and our buildings

- Review and update collections policies on an ongoing basis.
- Ensure accreditation standards and practices are at the heart of what we do and that full accreditation for all of our museums is achieved and maintained
- Create frameworks for cross organisational staff working in our curatorial functions.
- Work with other heritage professionals to address regional museum storage needs.
- Recruit further historic building specialists on to our governance committees
- Use volunteering and apprenticeship opportunities to support maintenance and conservation needs of our collections and buildings.
- Ensure all of our emergency plans are fully up to date and that all necessary resources and training are provided.
- Ensure all properties are fully assessed for fire and appropriate action plans are put in place.
- Develop and enhance deliverable survey, maintenance and curatorial plans for all buildings, grounds and collections. (1,3 and 5 year)

Aim 3. To transform the way we work

- Consolidate and strengthen our relationships with our Friends groups.
- Ensure the Senior Management Team (SMT) further develops visible leadership and effective management for staff across the Society.
- Build new partnerships with our local communities, including our local authorities.
- Review, strengthen and update our Health and Safety systems and procedures
- Implement procedures to ensure all of our activities are socially and environmentally sustainable.
- Continue to bring through high quality personnel policies and procedures.
- Strengthen our workforce development through agreed annual training plans.
- Integrate fully our research and museums/properties functions under one coherent management framework.
- Create a well-structured cross-organisational volunteering framework.
- Address our succession planning.
- Ensure that benchmarking standards are created for all processes and activities.
- Implement new mechanisms to support effective cross working between trustees and staff, particularly at a management level.
- Significantly enhance our IT and the ways in which we use it to work and to deliver our services.
- Ensure each property and service area has a newsletter which is regularly shared with all other staff.
- Establish performance management targets for all areas of the Society

- Create opportunities for traineeships, apprenticeships and work experience across the Society

Aim 4. To create a financially sustainable organisation

- Establish a coherent fundraising strategy and programme. Set clear targets for donations and grants.
- Maintain and operate the properties/museums to a standard which is competitive with local heritage and tourist attractions and meets the demanding standards required by Visit England (VAQAS) and other comparable bodies.
- Drive up visitor numbers through new displays, events and interpretation.
- Develop new sources of income, to reduce exposure to reliance on historical income streams.
- Enhance the speed and efficiency of our financial reporting and management information procedures.
- Enhance processes for our project development and management and provide training for staff.
- Maximise the use of the Society's website to enhance on line retail, donations and pre-booked ticket options.
- Develop resources and marketing at our properties to maximise donations.
- Undertake options analysis for all properties, all functions, and service areas. Set timetable for actions.
- Prioritise investment in major income generating areas.
- Appoint an externally funded fundraiser and project development manager.
- Maximise the presence of our on line commercial services.
- Maximise the business performance of our commercial services through established and monitored KPI's.
- Ensure that the functions and weddings activities have clear financial performance plans which are monitored and reported on.

Aim 5. To promote our work and activities

- Enhance 'ambassadorial' activities of all senior staff and trustees and ensure senior managers have clearly defined promotional roles
- Produce an annual marketing plan for the whole organisation supported by separate marketing plans for each property, each activity and every major revenue generating activity
- Engage actively with our membership in order to encourage donations, foster continuing membership and to seek their opinion upon a wide range of organisational issues.
- Continue to develop and strengthen our brand identity across all museums and all activities.

- Implement a clearly structured social media strategy.
- Continue to actively promote, develop and retain our membership.
- Continue to develop new communication initiatives such as site based e-newsletters and our members e-newsletter.
- Expand the usage of our website to promote the Society.
- Engage with local TV, radio and press media to increase public awareness of the Society.
- Develop a Friends group for Lewes Castle.
- Use our museums to host activities and events which promote the Society.
- Build stronger relationships with local political representatives to support for the Society's needs.
- Create member, staff and trustee social events.
- Establish a Society programme of ongoing archaeological and historical projects

Aim 6. To enhance our leadership role

- Establish clear aspirational targets for all our activities – research, display, community engagement, interpretation, learning, and curation.
- Consider innovative solutions to opportunities and risks. Be willing to embrace change by trialling changes with set-term reviews.
- Recruit and develop the highest calibre of staff and trustees who have recognised expertise and competence in their fields.
- Work with other archaeological, historical and museums organisations to establish our leadership role.
- Enhance and promote our learning and our research activities.
- Strengthen and promote the historical elements of our research activities.
- Embrace our unique selling points and actively promote them.
- Continue to develop clear processes and standards in our governance and strengthen our organisational leadership.
- Develop greater physical capacity to develop and host exhibitions based on the reserve collections as well as travelling exhibitions.
- Ensure staff and trustees represent the Society on local and regional groups and boards.
- Strengthen the board through an active programme of recruiting high quality trustees and co-options.
- Achieve accreditation for all of the Society's museums

- The **6 aims** underpin and inform all of the actions for the period 2016 – 2020, detailed in the **Strategic Action Plan** (Appendix 1).
- The major projects arising from the **aims** are detailed in the **Development Projects 2016-2020** (pages 32-38).
- **The Development Projects 2016-2020** identifies the staff and lead trustee committees responsible for the projects.
- The headline level **budget** for the Society for the Strategic Plan is given on page 39.

Some of the projects for 2016/17 have already received funding and are scheduled to begin in the first quarter of 2016. Work will be undertaken to bring all of the other projects through in the five year timeframe. However, the Society accepts that external environmental, economic, political or social changes may impact on the delivery of some projects. Likewise changes in external funding, grant giving, legacy donations...etc. may result in some projects being delayed or promoted.

7. Development projects 2016-2020

The Society's major development projects are detailed over the following pages.

Reference	Project	Indicative Costing	Income potential (1=high 5=low)	Heritage at Risk/ Curatorial needs	Overall priority (1-5)	Lead Staff and Committees
Lewes Castle (LC) LC1	Major ground floor project. Create disabled access into entrance area. New expanded meet and greet area. Significantly enhanced retail area including 4 new toilets– including one fully accessible toilet. New rear staff area, enhanced workshop, office and staff space. Enhanced stock area for shop. Removal of glass negatives to alternative store	£ 110 000 for whole project – access, 3 zones and moving of glass negatives.	1	3	1	CEO, Lewes Properties staff, Properties Committee
LC2	Opening of West tower of castle to public with new interpretation and repair to tower arch.	£ 15 000	2	3	2	CEO, Lewes Properties staff, Properties Committee
LC3	New pop up micro catering offer for summer period only for Gun garden	£ 8 000	3	5	3	CEO, Properties Committee
LC4	Property space changes – dependent on current negotiations the use of LC office space/the Library and some of the stores could be revamped in a way which supports the development of new visitor/display areas at Lewes Castle including a drop in research room.	£ 20 000	5	3	3	CEO, Properties and Research Committees.
LC5	Repair to roofing at Barbican House and fire compartmentalisation scheme	£ 70-80 000	5	1	1	CEO, Lewes Properties staff, Properties Committee
LC 6	Access development project in partnership with RNIB, funded by HLF. Designed to improve accessibility for those with visual access needs. Project will enhance overall interpretation.	£ 15 000	4	4	3	Head of Learning, Lewes Properties Committee

Fishbourne Roman Palace FRP1	New North wing mosaic display. A major project designed to significantly enhance the narratives and experiences which visitors could derive from viewing the mosaics. This would involve a mixture of drop down screens to create 'rooms' applied usage of lighting and sound. This would transform the learning, visual and dramatic experiences which could be offered.in the North Wing. Significant use of technology to support Interpretation.	Approximately £ 200 -300 000	1	2	1	CEO, FRP Manager and staff team, Properties Committee
FRP2	New Museum display. The museum would have a complete refresh. The new discoveries and interpretation could be shared, new IT access platforms could be offered, objects from the Society's wider collections would be used to enrich and develop this area.	Approximately £ 400 000	2	5	2	CEO, FRP Manager and staff team, Properties Committee
FRP 3	Major new outdoor interpretation centre showcasing three dimensional high quality reconstructions. This would act as a learning centre for children and adults, it would create commercial, retail and catering opportunities. It would be the centrepiece for community, stakeholder and partnership groups. It would be used for courses, weddings, theatrical performances, architectural research, craft workshops...etc. Creation of new Romanised façade for entrance way and current buildings to link the main museum and entrance area to the Collections Discovery Centre.	Dependent on scale – from £ 0.3 -1.5 million	1	4	2	CEO, FRP Manager and staff team, Properties Committee Research Committee

FRP 4	Building development initiative. A building development project which would bring money in to the Society. It would be located in the northern paddocks of the grounds. This could raise essential match funding for the site and create reserves for long term management.	Produce income for SAS	1	5	2	New Trustee and co-options committee and CEO, SAS Finance Officer, FRP Manager, Finance, Properties and Research committees.
FRP 5	Interpretation and public display project in the North wing. This will involve the projection onto a large angled screen of a range of archive images from history of the excavation. There will be projected images as well as listening devices. Alongside this would be the replacement of the illuminated information panels alongside the walkways at the Palace. The artefact handling and the seating area will also be significantly enhanced.	£ 70 000	1	2	1	CEO, FRP Manager and staff team, Properties Committee
Michelham Priory	Moat restoration project The moat has to be de-silted or it will be completely lost within 3-5 years. Once de-silted a long term maintenance plan will be put in place involving environmental stewardship and volunteer opportunities.	£ 300 000	4	1	1	CEO, Property Manager, Head Gardener and Properties Committee
MP 1						
MP 2	The working watermill needs to be re-roofed, some minor structural work needs to be undertaken and a major refresh of the interpretation needs to be delivered.	£ 60 - 80 000	3	2	2	CEO, Property Manager, MP staff and Properties Committee

MP 3	Development of the existing nature room and garage into one new environmental education centre for public and schools' learning programmes.	£ 150 000	2	4	2	CEO, Property Manager, MP staff and Properties Committee
MP 4	Development of reconstruction buildings programme. This would involve the construction of a Crannog type feature in the existing Ancient Crafts Centre based on the internationally significant discoveries at Shinewater, Eastbourne. This would allow the reconstruction buildings to become a centre for early crafts and technologies events, as well school and adults learning programmes.	£ 80 – 100 000	2	4	2	CEO, Property Manager, MP staff and Properties Committee Research Committee
MP 5	Crafts workshops – new crafts people and workshops will be established alongside our blacksmith in his forge so that the rural crafts and farming heritage of Michelham continue to be developed as part of the public and schools education programme.	£ 70 000	2	4	3	CEO, Property Manager, MP staff and Properties Committee
MP 6	Uplift of Michelham Priory shop	£ 3 000	2	4	2	MP Property Manager, Retail Officer and Properties Committee
AOC						
AOC1	Completion of present interpretation project and new phase concerning history of Lewes and Southover.	£ 25 000 (for new phase)	2	2	2	CEO, Museums Officer and Properties Committee

AOC2	Fire compartmentalisation project to protect building and pubic.	£ 15 000	5	1	1	CEO, Technical Officer, Properties Committee
AOC3	Expansion and enhancement of the retail space.	£ 5 000	1	5	3	Retail Officer, Properties Committee
AOC 4	Enhancement of 'staff kitchen' for use for catering, weddings and functions.	£ 2 000	3	3	4	CEO, Technical Officer Properties Committee
Marlipins						
M1	New interpretation in museum	£ 20 000	4	3	3	Museums Officer, CEO, Properties and Research Committee
M2	Essential major roofing repair project	£ 70 000	5	1	2	Museums Officer, CEO and Properties Committee
M3	Shoreham film project designed to showcase promotion of early film making in Shoreham.	£ 5 000	4	2	2	Museums Officer, CEO and Properties Committees
Priest House						
PH 1	Display enhancements as well as small, volunteer run, tea and coffee seating area at rear of museum	£ 10 000	4	3	4	Museums Officer, Curator and Technical Officer. Properties Committee.
PH 2	Storage and access enhancement project to upgrade cellar.	£ 3 000	5	2	3	Museums Officer, Curator and Technical Officer. Properties Committee

Library						
L1	Replacement of on-line catalogue search software.	£ 12 000	5	2	2	Museums Officer, CEO and Library Volunteers, Research Committee
Research and Curatorial						
C&R 1	Production of two new National Park guidebooks	£ 13 000	3	3	3	CEO, Marketing Officer Research Committee
C&R 2	Establishment of two new research projects - one for archaeology and one for history – these would have membership and public engagement elements.	£ 10 -15 000 per annum	4	3	2	CEO, Research Officer, Research Committee
C&R 3	Achieve full accreditation for all SAS properties	Investment of senior staff time	1	1	1	Museum Officer and Curator FRP Research Committee
C&R 4	Create funding framework for post excavation and publishing work related to Society's Tidemills community excavation project.	£ 10 000	5	3	3	Research Officer, CEO, Research Committee
C&R 5	Digitization of glass negatives held at Barbican House Museum. Images put on line and creation of displays and educational resources	£ 40 000	3	2	2	Museum Officer, CEO, Research Committee
Membership						
Me 1	Enhance and enrich membership offer and retention through research engagement projects as detailed under the research and curatorial component of the Society.	As above	2	3	3	Membership Officer, Marketing Officer, Membership Committee

Marketing						
MAR 1	Establish a series of fundraising dinners across the Society's properties.	Staff time costs	1	5	2	CEO, Marketing Officer, Fundraising Group
MAR 2	Establish a Friends Group for Lewes Castle	£ 1 000 start-up costs	2	4	2	CEO Marketing Officer, Properties Committee
Cross Organisation						
CO 1	Project management and fundraising. Funding sought for post to sit within SMT to enable project development and project fundraising to be supported.	£ 60 - 70 000	1	4	1	CEO, Finance Committee
CO 2	IT - This multifaceted project will upgrade the hardware and have an enabling effect on the business efficiency of the Society and well as developing the research and educational potential of the organisation.	£ 20 - 50 000	2	4	2	CEO, Finance Committee
CO 3	Support and development for cross organisational training and development project under HLF Skills for the Future scheme . Creation of 8 posts to support SAS work across Society, particularly in areas of display and interpretation.	£ 140 000	1	3	2	CEO, Personnel Officer, Personnel Committee
CO 4	Project to provide formal oversight and support for volunteering in the Society. Development of policies, procedures, training, support and development mechanisms.	£ 30 000	2	3	2	CEO, Personnel Officer, Personnel Committee

The **development projects** and the activities derived from the **six aims** are integrated within the **Strategic Action Plan 2016-2020**, Appendix 1.

The **Action plan** lists all of the major developments which the Society will undertake during 2016 – 2020 as well as ongoing projects and actions arising from the aims. The Action plan is organised under the same heading as the **Society's six core aims** (pages 27-31). The development projects, featured above, are cross referenced in the Action Plan through the relevant reference codes in the development projects table (e.g. FRP 1, CO 3...etc.)

8. The budget

The headline budgetary framework for the strategy period is detailed in the table below. This details the underlying budget for the Society. Project costs are **not** included in the budget as they will be established in separate project budgets which sit alongside this main organisational budget. All projects will be fully funded by outside bodies, Friends Groups, partner, members and individual donors so they will have an equal value above and below the line (i.e. income and expenditure will match).

Sussex Archaeological Society budget projection 2016 - 2020 (excluding projects)					
	2016	2017	2018	2019	2020
Income	£	£	£	£	£
Subscriptions	61,000	63,000	66,000	68,000	70,000
Admissions	690,000	725,000	760,000	810,000	860,000
Gift Aid (on admissions, membership and donations)	95,000	97,000	100,000	110,000	115,000
Commercial (café, shops, weddings)	630,000	660,000	695,000	730,000	780,000
Education	88,000	92,000	96,000	98,000	105,000
Investments	16,000	14,000	12,000	12,000	14,000
Other (rents, donations, research)	190,000	220,000	235,000	255,000	270,000
Total Income	1,770,000	1,871,000	1,964,000	2,083,000	2,214,000
Expenses					
Commercial,(non staff - eg stock)	210,000	215,000	230,000	245,000	260,000
Staff	1,100,000	1,130,000	1,150,000	1,200,000	1,230,000
Property based (Maintenance Eqpt, insurance...etc)	320,000	330,000	340,000	350,000	365,000
Other (advertising, office costs, SAC...etc)	200,000	210,000	230,000	240,000	255,000
Total Expenses	-1,830,000	-1,885,000	-1,950,000	-2,035,000	-2,110,000
Operating Surplus/Deficit	-60,000	-14,000	14,000	48,000	104,000

9. Delivering and reviewing the strategy

Project development and delivery

The staff responsible for the development and management of the projects are specified in the Development Projects 2016-2020 (pages 32-38) as are the responsible reporting committees of Council. The table details the key personnel and responsible governance groups. With all major projects a large number of members of the senior management team and Council committees will be involved in the projects, so only the lead staff and committees are identified at this stage.

a. Implementation and review of the strategy

The CEO and senior management of the Society will be responsible for the delivery of the strategy. The Strategy Committee will monitor the implementation of the Strategic Plan and recommend any updating of actions and new projects. The Strategy committee will report back formally to Council. It will do this annually for the November Council meeting.

Document author

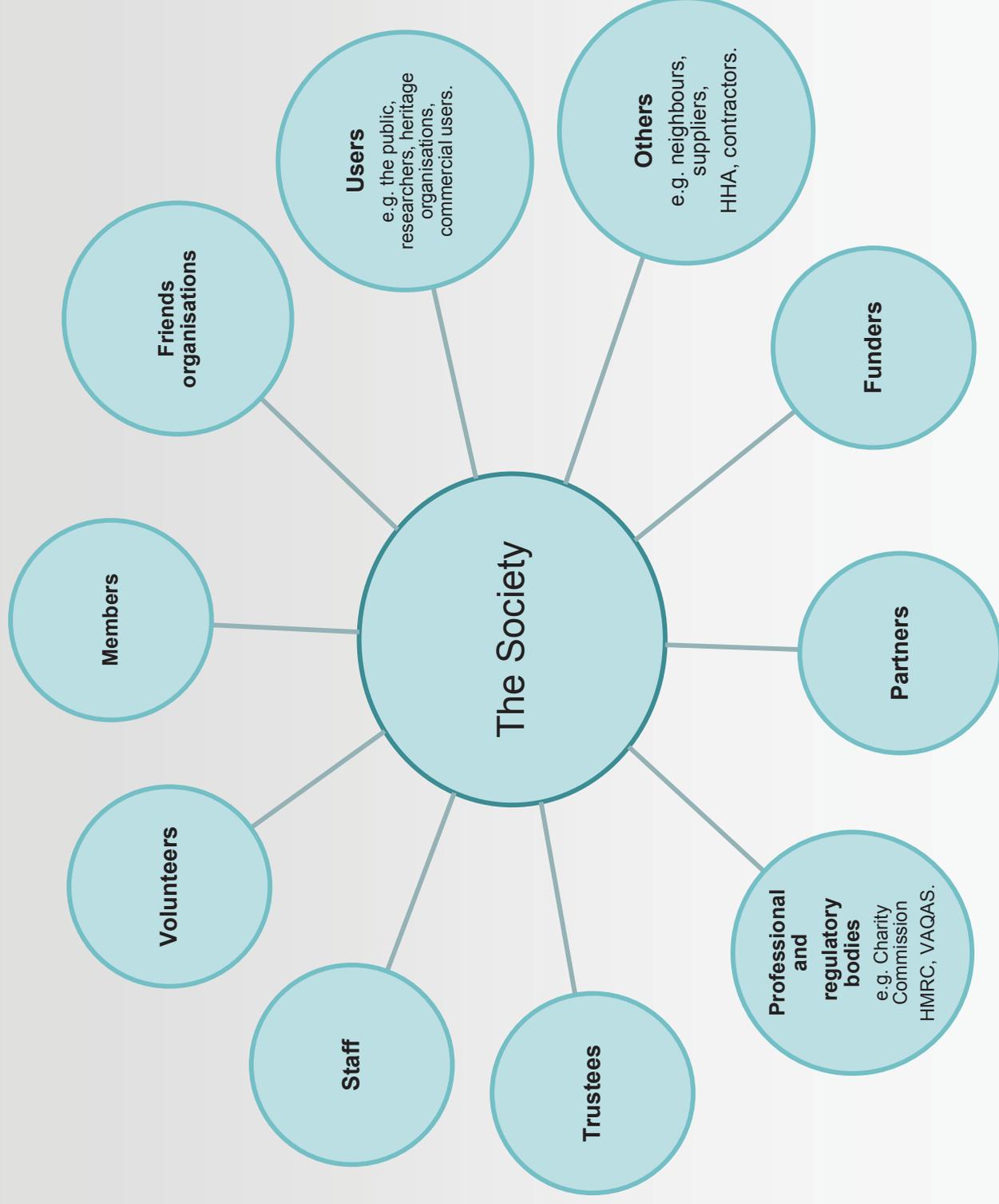
Tristan Bareham

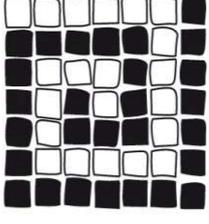
Chief Executive of the Sussex Archaeological Society

Sussex Archaeological Society – SWOT analysis 2015

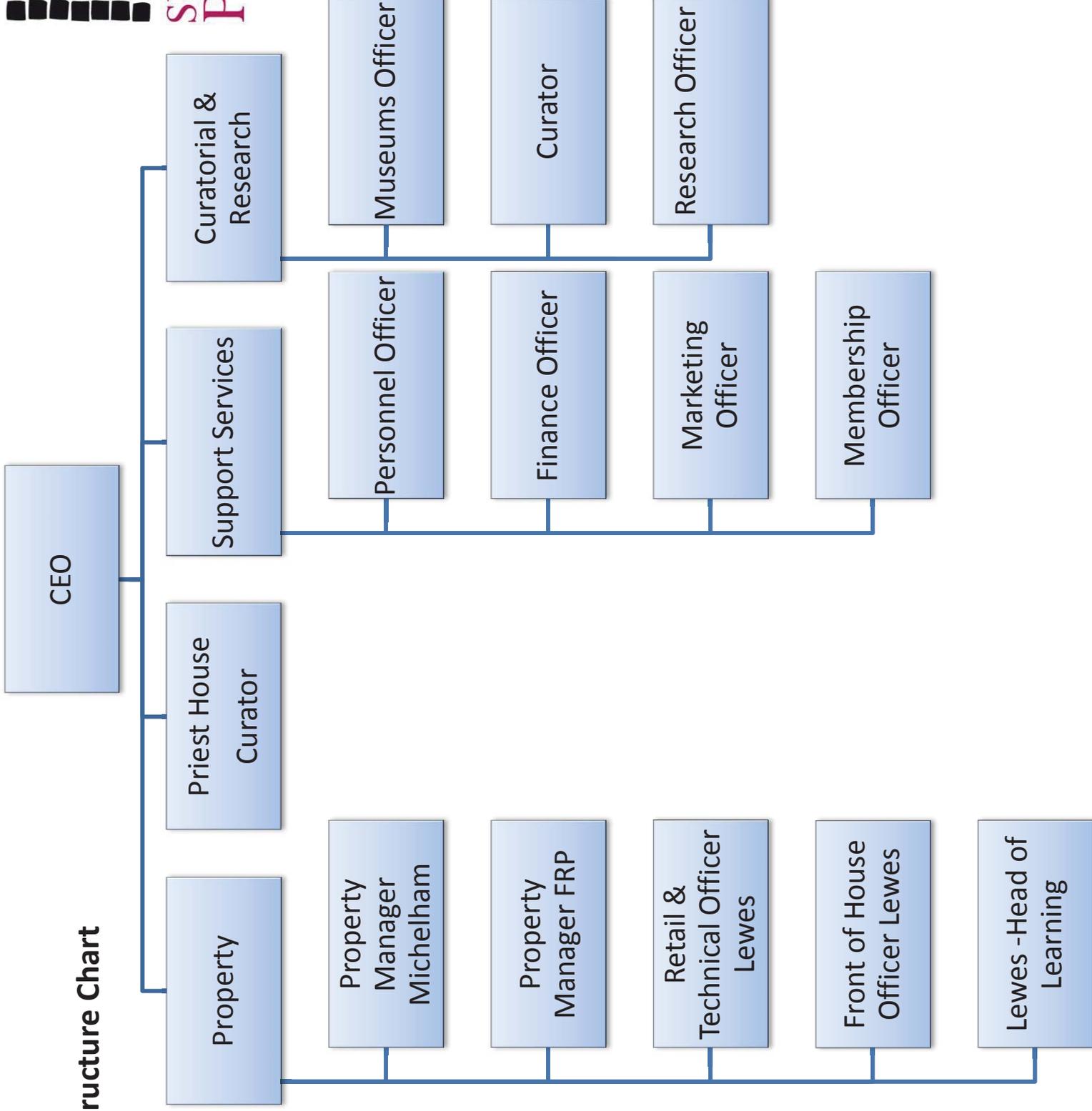
Strengths	Weaknesses
<p>Significant historical presence across both Sussex Counties</p> <p>170 year presence and positive reputation across a number of fields.</p> <p>Ownership of major historic properties/museums across Sussex</p> <p>Rich archaeological, visual and historical resources located in sites across Sussex.</p> <p>Diversity of activities from research, publishing, learning, commercial and curatorial through to operational management.</p> <p>Large experienced, staff team and volunteer base, with skills across numerous sectors</p> <p>Charitable status</p> <p>Substantial visitor base</p> <p>Strong membership</p> <p>Well established Friends groups for many of our properties.</p> <p>Some strong partnership working</p> <p>Professional standard storage at Fishbourne Roman Palace</p> <p>Good relationship with a number of significant funding bodies</p> <p>Some strong donor support</p>	<p>Challenging existing business model with limited and imbalanced income streams.</p> <p>Limited number of staff with regard to size of the task.</p> <p>Limited financial reserves</p> <p>High ongoing maintenance and conservation costs</p> <p>High staff costs arising from scope and geographical spread of tasks</p> <p>Inadequate IT</p> <p>Vulnerability to main income streams through uncontrollable variables such as weather.</p> <p>Complexity of organisation and geographical separation of properties</p> <p>Culture of conservatism and inflexibility in parts of the wider organisation.</p> <p>Limited/out of date museum storage in Eastern Properties</p> <p>Some reporting and information processes which do not meet time and decision making requirements.</p> <p>Some elements of organisational leadership</p> <p>Divisions within parts of the organisation.</p> <p>Limited experience and history in seeking philanthropic giving.</p> <p>Very limited high quality temporary display areas across all museums</p>
Opportunities	Threats
<p>Location in one of the most affluent and educated parts of the United Kingdom.</p> <p>Untapped development areas , e.g. rural crafts and the environment</p> <p>Continuing general public interest in culture and heritage</p> <p>Strong relationship with a number of funding bodies.</p> <p>Development of new interpretation models to attract new audiences.</p> <p>Expansion and development of Friends, partners and stakeholders.</p> <p>Richness of sites and collections</p> <p>Organisational enrichment through recruitment and development of new trustees, co-options and staff.</p> <p>Quality of the gardens and grounds of the Society's properties</p> <p>Pan Sussex profile</p>	<p>Financial impact of further unanticipated changes to legislation (e.g. Gift Aid, living Wage, National Curriculum, planning)</p> <p>General Economic and environmental circumstances beyond control (e.g. recession, weather)</p> <p>Increasing costs of legacy pensions commitment</p> <p>Increased high standard competition of local heritage and visitor attractions</p> <p>Loss of experienced staff.</p>

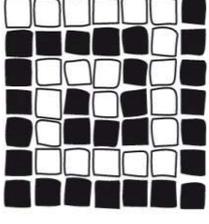
Sussex Archaeological Society – Stakeholder map





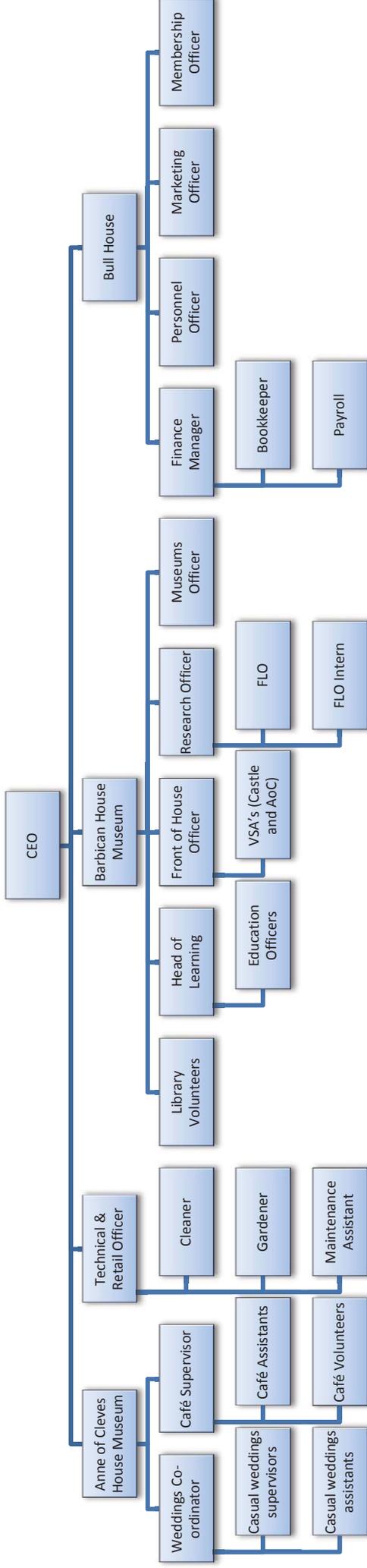
SAS Structure Chart



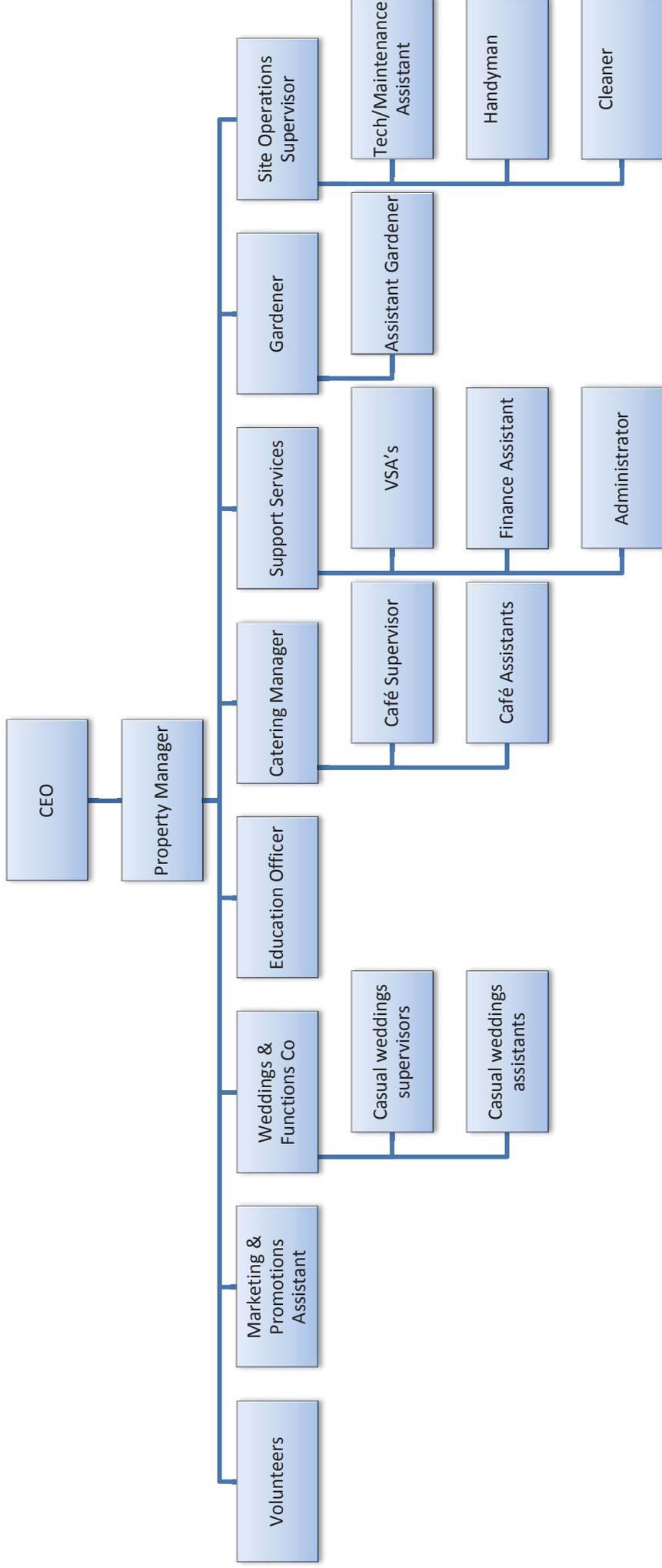


SUSSEX
PAST

Lewes Organisation Chart



Michelham Priory Organisation Chart



Fishbourne Roman Palace Organisation Chart

