



Elgin Museum **Forward Plan 2022 – 2026**

Approved:
Review date: July 2026

‘To protect, present and promote the heritage of Moray for the benefit of all.’

Elgin Museum’s Strategic Aims 2022- 2026:

- Increase user numbers
- Improve access to, and promotion of, Moray’s heritage
- Ensure the long-term care and display of our collections
- Secure the future of the Museum buildings
- Improve long-term sustainability (finance, human, environment)
- Care for and develop our workforce
- Provide an educational resource
- Work with other organisations with overlapping aims
- Act as a focus for the receipt of objects from the Moray region
- Be the best museum heritage tourism experience in Moray

Elgin Museum

Forward Plan 2022 - 2026

Name of museum: Elgin Museum
Name of governing body: The Moray Society
Date on which this policy was approved by governing body: October 2022
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1. Introduction

This Forward Plan is an extension of the 2019-2023 Forward Plan. It is being introduced prior to the conclusion of the preceding document in light of the change in circumstance Elgin Museum faces in the ongoing Covid-19 crisis. With many of the actions and objectives outlined in the 2019-2023 Forward Plan no longer deliverable within the timeframe of the document, it is felt that it is an opportune moment to review the past 3 years, reassess the priorities of Elgin Museum, and formulate a new Forward Plan to take the Museum to our next Accreditation in 2026.

The overall aim remains to create a plan which helps Elgin Museum perform to its best, and to ensure the future survival of the Museum and its collection for the enjoyment and education of future generations.

The Plan has been produced in consultation with our workforce (paid and unpaid), the Elgin Museum Management Committee (EMMC) and our governing body The Moray Society. The Forward Plan was adopted in October 2022. It covers the period 30th June 2022 to 1st July 2026.

The Action Plan will be subject to review on an annual basis. The review will be undertaken by the EMMC, with a report submitted to The Moray Society Board to agree any recommendations and approve the review. The new Forward Plan will be reviewed 6 months prior to its end date (July 2026), unless otherwise specified by The Moray Society.

2. Statement of Purpose

The Moray Society, a charitable membership organisation, owns and manages Elgin Museum. The purpose of Elgin Museum is to conserve and display the objects and archive in its care, to act as a focus for learning and enjoyment for all and to support the appreciation of the natural history, culture and heritage of Moray and to maintain the buildings in its ownership.

The Strategic Aims of Elgin Museum are:

- Increase user numbers
- Improve access to, and promotion of, Moray's heritage
- Ensure the long-term care and display of our collections
- Secure the future of the Museum buildings
- Improve long-term sustainability (finance, human, environment)
- Care for and develop our workforce
- Provide an educational resource
- Work with other organisations with overlapping aims
- Act as a focus for the receipt of objects from the Moray region
- Be the best museum heritage tourism experience in Moray

3. Previous Forward Plan

3.1 Review of Forward Plan 2019 – 2023

The Forward Plan 2019-2023 was a new approach for our organisation to planning our priorities and took into consideration Museums Galleries Scotland's National Strategy Aims, the Scottish Government National Outcomes, and local and national tourism strategies as well as the overarching vision of The Moray Society.

The Action Plan was challenging to implement and there are improvements to be made in adoption of the action plan, delivery of actions and monitoring, which will be a priority going forward. It is clear that an annual Action Plan, rather than a 3-year Action Plan, will be more manageable within our organisation and we will strive to improve stakeholder buy-in to this approach to managing the Museum.

The most significant impact on our delivery of aims and priorities of the 2019-2023 Forward Plan was the arrival in early 2020 of the Covid-19 pandemic. This saw the closure of the Museum in February 2020 to all volunteers, staff and visitors, and the cessation of all in person outreach activities and events. It also resulted in the postponement of a grant-funded Geology exhibition and programme of events, *At the Water's Edge*. With no in-person access, events or activities, we made the decision to move our outreach programme online, building on the limited online outreach begun in 2017. This brought with it its own challenges, including the limitations of digital exclusion on audience reach and an audience learning to use new technologies. We also lost our NLHF & Robertson Trust-funded Teens & Tweens Officer in Summer 2020. Although we were able to appoint a replacement, unfortunately this was not for the duration of the project. As a result, the Teens & Tweens Project was concluded early.

Covid-19 also impacted our buildings redevelopment programme but did offer an opportunity to consider how to "future proof" the workspace in the event of a similar future pandemic scenario. We have continued to work with our architect to develop our plans in an attempt to create the most usable space for our user group, now and in the future.

The strategic aims of the Museum, as outlined in the 2019-2023 Forward Plan remain the same, and we endeavour to deliver these through the extended Forward Plan for 2022-2026.

3.2 Key Achievements of Elgin Museum 2019 – 2021

Although 2019 was a “normal” year for the Museum, the Covid-19 pandemic impacted on what the Museum could deliver and achieve within the lifetime of the previous Forward Plan. However, there were still several highlights:

- The Museum migrated to Microsoft Office 365, enabling The Moray Society and EMMC to continue to meet virtually, and to improve opportunities for homeworking amongst volunteers and staff.
- The Elgin Museum Geology Group (EMGG) sourced funding and delivered a new Geology exhibition, *At the Water’s Edge*, and a programme of events, *Fossil Finders*. Originally scheduled for 2020, the exhibition and events were instead delivered, on a reduced scale, following our limited reopening to visitors in August 2021. The *Fossil Finders* events explored a new way of delivering outreach with an external partner organisation, including provision of training by the EMGG to the external organisation. That it was even possible to deliver it at all is testament to the determination of our Geology Group volunteers.
- We expanded our digital presence to continue engaging with our audience during Covid-19 lockdowns. Our volunteers created online family-friendly activities, started a new monthly/bi-monthly Museum Update email, created a blog *Museum Musings*, and switched the in-person lecture series to online.
- Our YouTube subscribers increased from 4 subscribers in 2017 to 168 by 31st December 2021
- We completed a full review of the Museum’s building stock, undertook an options appraisal and feasibility study on the building stock to assess potential redevelopment opportunities to increase accessibility, usability, improve functionality and facilitate the long-term security of the Museum

A summary of achievements from 1st January 2019 to 31st December 2021 is included in the table below:

Year	Achievement
2019	Retained Museum Accreditation
2019-20	Completed full review of Museum’s building stock
2020	Began <i>Museum Musings</i> online blog
2020	Started a new online Museum Update “newsletter”, circulated to Moray Society members, Volunteers and “Friends of” Elgin Museum.
2020	Migrated to Office 365

2020	Received grant from MGS to purchase equipment to help deliver online/digital content
2020	Created new video “tours” of museum displays and collections on our YouTube Channel
2020	Launched the <i>Elgin Museum: in conversation</i> interview series, in place of our usual in person winter lectures.
2020	Launched <i>Elgin Museum Makes</i> online craft activity series on our YouTube channel
2020	Created <i>Elgin Museum @ No3</i> - a series of changing window displays at No3 High Street showing items / images from the collection
2020-21	Undertook an options appraisal and feasibility study for the Museum building stock. Agreed an option to progress through discussions with HES and Moray Council.
2021	Hosted an online <i>Friends of Elgin Museum Art Exhibition</i>
2021	Received grants from MGS & Visit Scotland to help install mitigation measures to enable the museum to open to visitors
2021	Began an inventory of museum stores
2021	Reopened to visitors, on a limited basis, in August 2021
2021	Hosted our <i>At the Water's Edge</i>
2021	Delivery of <i>Fossil Finders</i> programme of events
2021	Joined the North East Scotland Heritage Network (NESHN), an MGS supported forum
2021	Created and launched new Elgin Reptiles book
2021	Our YouTube videos were watched 4313 times in 2021 (an increase from 3400 in 2020, and 962 in 2019)
2021	168 YouTube subscribers (up from 105 in 2020, and 33 in 2019)
2021	First visit of Andante travels tour group, with the hope of this becoming a regular event
2021	Formed internal Collections Management Group
	Anything else? (only to 31st Dec 2021)

While there are no longer national lockdowns in place, Covid-19 continues to present challenges to the Museum and its day-to-day operation. It will continue to limit what we can realistically achieve and continues to impact visitor numbers. There continues to be some reluctance from the public to visit indoor attractions and visitor numbers are noted as lower in general this year (across the visitor attractions sector). Volunteer availability also dictates when we are able to open to visitors.

Uncertainties remain, not only in terms of the Covid-19 situation, but also financially, politically, the continuing deterioration in the condition of our building stock, and around staffing (paid and unpaid).

4. Development of this Plan

The present Plan was created by reviewing the previous Forward Plan and analysing the Museum's current situation. It takes account of Museums Galleries Scotland's National Strategy, the Scottish Government's National Outcome, the Strategy for Tourism Development in Moray, The Moray Council's Cultural Strategy, Historic Environment Scotland's policies and strategies, the Moray Society's Constitution and other relevant documents.

This extension to the Forward Plan is being introduced prior to the conclusion of the preceding document in light of the change in circumstance Elgin Museum faces in the ongoing Covid-19 crisis. We are not alone in the challenges which Covid-19 has introduced, but the pandemic has had a significant impact on all aspects of Museum life. As we look to develop a survival strategy, we have taken the opportunity to revisit the Forward Plan and reassess our deliverables to make them more pertinent to the current situation and more deliverable. This by no means takes away from our longer-term aspirations of more permanent paid Museum staff and organisational financial stability but addresses current need and will help focus our priorities.

Views of staff and volunteers have been sought on the proposed aims and how to achieve them, and the Plan has been reviewed by the Elgin Museum Management Committee and Moray Society Board.

5. Monitoring this Plan

Progress toward the actions identified in this Forward Plan will be monitored on an ongoing basis with an update report being prepared by the EMMC for the Moray Society trustees at their last meeting before the annual AGM. Milestones will be set for each of the objectives to assist with progress monitoring.

A one-year Action Plan is included with this Forward Plan, as it is felt that this is a more appropriate timescale over which to plan. However, it is proposed that the Action Plan is subject to a full review twice annually by the EMMC, in the early part of the year (January/February, to address actions for the open season) and in the middle of the year (July/August to address actions for the closed season). Any significant amendments to the Action Plan will be presented to the Moray Society trustees for approval. It is imperative that closer monitoring and delivery of the Action Plan is implemented by the workforce going forward.

A full review of the Forward Plan will be undertaken 6 months prior to its end date (review in c. January 2026) and action taken accordingly. Implementation of this plan will be the responsibility of the EMMC overseen and approved by The Moray Society Board.

6. Current Situation

While visitor numbers in 2019 were consistent with previous years, our closure for the whole of 2020 and much of 2021 has naturally had a significant impact on the number of visitors to Elgin Museum. We opened on a limited basis (weekends only) from August to December 2021 and reopened on weekends only in May 2022. Visitor numbers have been relatively steady, but lower than pre-Covid-19, as is the case across the sector. Although we are free to visitors, we are in 2022 also seeing the impacts of the UK cost of living and fuel price crises, with people perceived to be travelling less, donating less and spending less in the Museum Shop.

It is therefore essential that the Museum reevaluates its operational model, to improve our resilience as an organisation and, importantly, as a business. Budget management needs to be improved, and we must prioritise our financial sustainability. Changes will need to be made, and new and innovative solutions considered. This, of course, must be accompanied by a high level of customer service, and we must continue to meet the expected standards of an Accredited museum.

6.1 Organisation Structure

Elgin Museum is an independent museum owned and operated by The Moray Society, a membership organisation. The Moray Society is also a company limited by guarantee and a registered Scottish charity. It has a Board of Directors, including a President, Vice-president and Treasurer/Company Secretary. The Moray Society is governed by a Constitution which outlines its role, remit and responsibility. Its primary functions are to safeguard the Museum and to ensure that the Museum and any associated activities contribute to the Society's aims to promote and conserve Moray's heritage.

Day-to-day management of the Museum and decision making is devolved by the Board to Elgin Museum Management Committee (EMMC). The EMMC reports to Board, who make the final approval of any plans and policies which affect the Museum.

Early in the Covid-19 pandemic, an Emergency Executive Committee was formed, comprising the Museum Convenor along with the Moray Society Treasurer, Vice-president and a long-standing and experienced Board Member. This group oversaw essential management and maintenance of the

Museum during the Covid-19 pandemic, enabling time-limited complex decisions to be made quickly in line with Museum Policy, the Moray Society Constitution and in line with national government guidance.

6.2 Public Opening and Facilities

Pre-Covid, Elgin Museum was open to the public annually from April to October inclusive, but accessible year-round by appointment. As a result of the pandemic, we were closed throughout 2020, and only reopened to visitors on a limited basis (weekends only) between August and December 2021. In 2022 the Museum opened in May, again only on weekends.

Entry remains free, although donations are welcomed. By offering free entry, we are accessible to all, regardless of income levels. This approach also results in frequent repeat visits.

Our pre-Covid opening hours during the summer season (generally 1st April to 31st October) were:

- Monday to Friday, 10 am to 5 pm
- Saturday, 11 am to 4 pm
- Sundays in July & August, 11 am – 4 pm (this was trialled in 2018 and continued in 2019)

During 2021 and on into 2022, our opening times are:

- Saturday, 11 am – 3 pm
- Sunday, 11 am – 3 pm

Open days and times are subject to volunteer availability, willingness of volunteers to work under Covid-19 mitigations, and also takes account of essential ongoing collections work which began in 2021 and continues (works being carried out weekly, on Mondays – Wednesdays).

Though closed during the winter season (generally 1st November to 31st March), the Museum can be, and is, still visited by groups and individuals by appointment. During the pandemic, we have limited group size and ensured that group access is exclusive. We have also introduced a donation charge for group visits.

Pre-pandemic, a wide range of events and activities was run in the Museum throughout the year. We have since 2020 migrated the majority of our activities and events online, with only a handful of in-person activities having been carried out in 2021. In order to comply with Covid-19 guidance, these events were outdoor events. We have also removed the various Children's

activities / trails from inside the Museum, instead providing free “take home” activities for under-18s.

The Museum has two ground floor galleries and a first-floor gallery (accessible by staircase only, although information about items on display in the upper gallery is available in the lower gallery). The gallery areas combine a mix of permanent and temporary displays. The upper gallery also has a display area used for temporary art exhibitions. During 2021 and 2022, QR codes have been introduced with information about displays, rather than printed information. A one-way system has also been introduced, to help minimise pinch points and ensure smooth & safe passage throughout the building.

Facilities at the Museum include a reception area and shop, an accessible toilet and a baby changing area (though it is not possible for this to be used in the ongoing pandemic). All of our toilet facilities now have hot water, thanks to a grant received during the pandemic. The shop, normally at the entrance to the Museum, has been relocated to the Lecture Hall as part of the one-way system. From 2021, we began to slowly reintroduce group visits, on request. Appointments can be made to view or research objects in the Museum, including items not on display.

Our Lecture Hall, normally used for Museum events, activities and meetings and other private events, has been repurposed as the new Museum Shop and exit. There is also a photographic exhibition of Moray and Elgin in old photos in the Lecture Hall.

Pre-Covid, the Museum could also be hired out for private events, for example weddings or corporate events; we have not been able to offer this service since 2019 but look to reintroduce this, on a limited basis, going forward. We will also review the donating charge for such events.

6.3 Staffing

The Museum has both paid staff and unpaid volunteers.

Permanent paid staff comprise two part-time employees:

- Museum Assistant
- Janitor

Title	Funding Source	Hours/week	Nature of work
Museum Assistant	Museum funds	18	Cataloguing and collections care
Janitor	Museum funds	Seasonal hours	Maintaining a clean and tidy Museum and stores, and in

		(between 9 – 13 hours / week)	summer, also Saturday custodian. Fire alarm and appliance checks.
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Paid staff are line managed by the volunteer Museum Convenor (or other specified Board member) and are subject to regular reviews. Training is available in-house and externally. Budget for external training is limited, and generally relies on external funding being available. New posts are generally identified on a project specific basis, to meet a particular need, and are usually only feasible if external funding can be sourced. When funding permits, new posts are advertised internally and externally, locally and nationally.

Volunteers undertake the remainder of roles required for the Museum to operate. This includes Visitor Services roles (enabling the Museum to open to visitors); 'Behind the Scenes' work; organising, running and promoting events and activities; task specific roles; our management committee; and our board of Trustees. Volunteers are coordinated by a Volunteer Mentor and Volunteer Rota Coordinator. A minimum of 4 volunteers per day is required for the Museum to open to the general public in the 'open season'.

Other task specific roles filled by volunteers include buildings maintenance; archaeology collections; collections management; geology collections; fundraising; publicity and marketing; shop management; social media; and website editor (see the workforce flowchart below for more details). These volunteers report to the volunteer Museum Convenor and Elgin Museum Management Committee (EMMC), a voluntary committee. Along with the volunteer Finance Committee and volunteer Moray Society Membership Secretary, the EMMC reports to the Moray Society (TMS) Board of voluntary trustees, the MS Treasurer, MS Vice-president and MS President (all volunteer roles).

Training is available for all volunteers internally, and externally on request (when budget permits). New volunteers are recruited through word of mouth, through social media campaigns, through our website and through the local press and local voluntary organisations such as tsiMORAY.

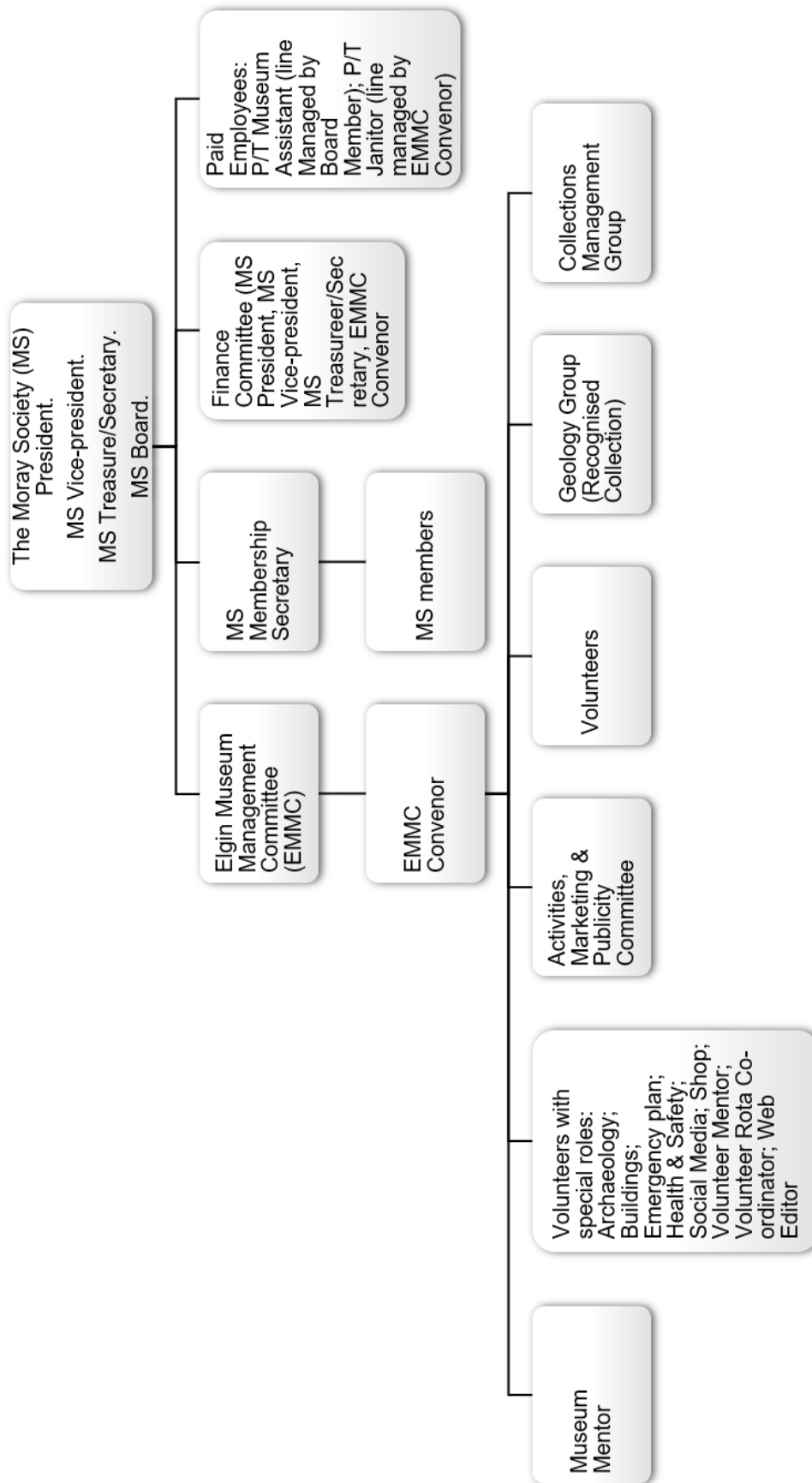
All our staff, whether paid or unpaid, are valuable members of Elgin Museum and are treated with the utmost care and respect. The Museum cannot function without its dedicated and enthusiastic workforce, and it is therefore essential that all staff feel valued and rewarded. With our limited budget, it is difficult for us to offer the development and training opportunities for staff which we would like. Succession planning can also be challenging. These are both issues which we look to address in the coming years in order to improve

workforce morale and to increase the resilience of Elgin Museum to expected challenges.

The table below summarises our paid and voluntary workforce:

Role	Number
Museum Assistant (p/t) (Paid Staff)	1
Janitor (p/t) (Paid Staff)	1
Volunteers (Front of House/gallery assistants, general)	68
Elgin Museum Management Committee	12
Moray Society Board Members (Trustees)	8

The structure of our paid and voluntary workforce is outlined in the workforce flowchart on the following page (figure 1):



1: Elgin Museum Workforce Flowchart 2022

6.4 Audience

Elgin Museum is free to visit, meaning that we are accessible to all, regardless of income levels, and we are popular for repeat visits, especially with young families. Our audience is recorded in four area categories: Moray area; Scotland; the rest of the UK; and the rest of the world. Visitor types include local residents, tourists, school/student/special interest groups and researchers. We record visitor demographics in the form of 'adult' and 'child', but do not record specific age range or any other social demographic information. Generally, the number of adult visitors is around two to three times the number of child visitors. Children under the age of 16 must be accompanied by an adult when visiting the Museum.

Year	Adults	Children	Total Visitors
2016	9,045	2,535	11,580
2017*	8,818	2,822	11,640
2018 (to 3rd November)	7,226	2,352	9,578
2019	7,345	3,574	10,919
2020**	238	274	512
2021***	696	248	944
<p>*Note: figures for 2017 include Museum events held in other locations (walks, training etc) **Note: Elgin Museum was closed from March 2020 ***Note: The Museum was only open on weekends from 7th August to 10th December 2021</p>			

During 2019, our visitor numbers remained high. With the Covid-19 pandemic and associated Museum closures, our visitors numbers have dropped significantly (see table above – with pre-pandemic visitor figures included for reference).

Entry to the Museum is free, and has been since 2013, however donations are welcomed, and encouraged, and contribute significantly to the Museum's budget as our primary source of independent income. The monies received as donations help keep the Museum in operation, contributing towards daily running costs, building maintenance, collections care, displays and events.

On the whole, feedback received from visitors is positive. Visitor feedback is recorded internally, in our Visitors' Book, and the information collated by a volunteer for annual review. Any issues or negative comments are addressed at the time of submission where possible. We also receive feedback by email, in writing and via our social media channels. We are rated on Google, with 139 reviews and a score of 4.7 out of 5. We are also rated number 10 out of

54 'Things to do in Elgin' on Tripadvisor, with 110 reviews and average score of 4.5 out of 5. We encourage visitors to review their visit whenever possible.

In 2021, an online customer satisfaction survey was undertaken in response to our *At the Water's Edge* (ATWE) exhibition. Those who completed the survey were asked the reason for their visit, how they would rate the ATWE exhibition, and for any other comments about their visit. Over half of those visiting the Museum had done so specifically to visit the ATWE exhibition, with the remainder being new and repeat visitors for a more general museum experience. We received positive feedback on the ATWE exhibition, with 76% of those completing the survey rating the exhibition as Excellent or Very Good.

In terms of more general feedback those completing the survey were very complimentary about our volunteers, describing them as approachable, friendly, enthusiastic, helpful and knowledgeable. There was appreciation of having volunteers on-hand throughout the Museum to answer queries and provide information, and praise for the mitigation measures put in place in response to Covid-19 having made visitors feel safe / comfortable. The new shop arrangement (in the Side Hall) was praised for being more spacious and easier for browsing, and the good range of books available relating to the collections was noted. The Museum was described as "Excellent" and "Fantastic". Our exhibitions and displays were rated highly for their variety, but some were disappointed that more space was not dedicated to displaying the Geology collection while others asked for descriptive labelling within display cases.

Feedback was largely positive but offers insight into areas for improvement as well emphasising the importance of continued high quality service delivery.

We have been limited since 2020 in what in-person activities and events we can offer, with a switch to online delivery. As well as expanding our social media programme, online activities have included video tours of exhibitions and displays; how-to videos of children's craft activities; Elgin Museum: In Conversation, our video interview series in place of our normal Winter lecture series; downloadable children's / family activities; Museum Musings, our online blog; and Elgin Museum Update, a regular cheery update for our volunteers, Moray Society members, and other friends and supporters of the Museum.

This has allowed to us to reach new audiences, including those who might not normally be able to access the Museum (see table below).

	2017	2018	2019	2020	2021
YouTube Subscribers (total no)*	4	24	33	105	168
YouTube Views (per year)	47	2100	962	3400	4313
YouTube Watch Time (hours per year)	0.8	64	28.1	169.4	224.5
Twitter Impressions**	260.9K	191.4K	86.9K	273.6K	143.7K
Twitter Followers	-	1147	-	-	1548
Instagram Followers***	-	522	-	-	1250
Facebook Likes****	-	290	-	-	849
Facebook Followers	-	277	-	-	907
Website (Page views)	-	6772	20889	17069	24772
Website (No of users)	-	2361	7312	6181	6881
Total No of Views of Museum Updates (e-newsletter / Sway)*****	-	-	-	-	5409
<p>*Note: YOUTUBE SET UP 23/03/2017 **Note: TWITTER SET UP 01/03/2014 ***Note: INSTAGRAM SET UP 01/01/2018 ****Note: FACEBOOK SET UP 23/05/2018 *****Note: STARTED IN 2020</p>					

We look to continue these successful online activities as we begin to slowly reintroduce in-person events. Building on successful events hosted under the *At the Water's Edge* project, we also look to take the Museum out into the community more making stronger connections between the Museum, its collection, and the region from which our objects are drawn.

During the timetable of this Plan, we seek to increase:

- visitor numbers
- membership of The Moray Society
- number of volunteers
- Museum users (i.e. not just those visiting, but those using our objects and spaces)
- digital visitors

We recognise the challenges this may hold, but would look to work with local agencies, such as Visit Moray Speyside Tourism and Embrace Elgin BID, as well as national organisations as we look to improve our performance.

The ability to appeal to and attract visitors and supporters is crucial to the Museum's survival and is an area which will continue to be a key focus for us over the next 5 years as we seek to increase user numbers and improve our sustainability.

6.5 Access

We aim to be as accessible as possible to users but recognise our limitations. The Museum is housed in a Category A-listed building dating to the 19th Century, with displays housed on two floors. The design of the building is such that it is impossible for us to offer access to the upper floors to those with limited mobility. There is currently no capacity to introduce a lift or chair lift, but this is an issue we will look to remedy as review the condition and functionality of our building stock.

Our core displays are all on the ground floor, with information available on our website via QR codes and from our Visitor Services Volunteers. Information about displays in the upper gallery is also available on our website, with video tours of some displays accessible on our YouTube channel.

We do not presently offer any braille or tactile interpretation of our displays, but our Visitor Services Volunteers can provide descriptions of displays on request. We can also take the Museum out to local community groups, offering object handling to those unable to visit the Museum in person. There is a hearing loop system in our reception/shop area and our lecture hall, and foreign language guides are available on request. We have developed our digital presence during 2020 and 2021, enabling those who cannot visit in person to experience the Museum from their own homes. We look to continue to expand on our digital offering.

6.6 Environmental Sustainability

Elgin Museum and its governing body, The Moray Society, are committed to sustainability to ensure not only their long-term future but that of the environment in which they exist. It is seen as paramount that all resources, whether human, financial or relating to the environment are well cared for, that waste is minimised, and that the aspiration is maintained to improve year-on-year. A culture of sustainability will be promoted throughout the workforce. It is however acknowledged that the nature of the Category A listed building can impose certain constraints on options for energy conservation.

6.7 Finance

The Museum's financial position is relatively good, but Covid-19 has provided a challenge. Visitor donations have obviously dropped having been closed for 2020 and only open in a limited fashion in 2021 and on into 2022. We have also seen increases in costs of material, services and utilities, which causes us significant concerns going forward.

Financial Year	Gross Income	Total Expenditure
January 2015 – December 2015	£127,096.00	£115,257.00
January 2016 – December 2016	£152,998.00	£121,803.00
January 2017 – December 2017	£140,921.00	£223,650.00
January 2018 – December 2018 (estimated)	£163,279.00	£205,000.00
January 2019 – December 2019	£77,588.00	£95,973.00
January 2020 – December 2020	£88,484.00	£93,658.00
January 2021 – December 2021	£101,900.00	£127,375.00
Note: the Museum holds only one bank account		

We have been successful in receiving Covid-19 support grants from various organisations, including MGS, Scottish Government, HES and Visit Scotland, as well as having received a business interruption payment from our insurance. These grants have helped to implement measures to mitigate against Covid-19 risk, to help us diversify our offering with a more digital-focussed approach.

While we will continue explore other avenues of income, for example through sponsorship of objects or displays, at present we rely heavily on legacy donations and grants from external funders. We retain our investments at present as security for the future, but continue to monitor and review them in order to maximise growth.

In terms of improvements, we have installed 2 new debit/credit card payment machines, which can also be used outside the Museum at off-site events. This has had a significant positive impact on Shop Sales during our limited opening in 2021 (and onwards), with people preferring to make card payments rather than cash for purchase and for visitor donations.

Being a volunteer-run organisation limits the resources available to fully investigate alternative funding opportunities, but financial sustainability continues to be high on our agenda over the coming years to ensure the

future of the Museum. One avenue we look to pursue is the appointment of a fixed term Funding Development Officer, funded through a grant received from MGS.

6.8 Collection

The Museum continues in its aim to appropriately conserve and display the objects and archive in its care and develop its collection in line with MGS guidance and policy and the Museum Association Code of Ethics. Our collection and collecting policy are governed by our Collections Development Policy (reviewed and updated 2018) and our Care and Conservation Plan (reviewed and updated 2018). Authority for agreeing new acquisitions is delegated to the Collections Management Group, formed in 2021. Where payment is involved this must first be authorised by the Treasurer who will refer the matter to the Moray Society Trustees if considered necessary.

Description of Items	Number of Items (approximate, Data from National Audit 2002)	% of Collection
Archaeology	1,666	4.54
Foreign ethnography	8,66	2.36
Geology	1,642	4.48
Natural history*	11,926	32.53
Social history	20,560	56.09
Total	36,660	100
*Note: this number includes multiples of <i>butterflies and moths</i>. These figures are now under review for disposal as the collection is remounted.		

It is estimated that 20% of the Museum's collection are currently on display. This includes 28 items designated as National Audit 'Star' Items. We also hold 'Recognised Collection' status for our palaeontology collection and its archive, granted in 2008.

The purpose of the Museum's collection is to be a focus for learning and for enjoyment, and to help our audience to experience and understand the natural history, culture and heritage of Moray. Our collecting policy has developed considerably over time, but our current policy can be summarised as follows:

- to preserve important material for the benefit of Moray and the wider community
- to build on the existing strengths of the collections

- to collect material to support teaching, research and public engagement
- to collect material specifically relating to the Moray region

6.8.1 Interpretation and Displays

On the whole, feedback from visitors is that our displays are informative and present the objects well. Interpretation is produced in line with accessibility guidance. Feedback over the last 4 years has highlighted that interpretation is an area which might benefit from some improvement, in terms of how and where information is presented. This is an issue which will be investigated over the period of this Forward Plan.

Issues around the lighting of displays has also been raised, and works to address this have already been undertaken. Further improvements will be looked at under the wider building improvements programme.

Visitor feedback has indicated a desire to see more of our palaeontology and archaeology collections on display. Improvements to our displays in these areas are ongoing aspirations, limited by funding and staff resource. However, we will continue to investigate options with the ongoing aim of offering an engaging and enjoyable visitor experience.

6.8.2 Research and Learning Opportunities

In January 2018, a project-specific Learning and Access Officer was appointed focussed on engaging with the 'Teens and Tweens' age demographic. The appointee left the post during 2020, prior to the completion of the project, and the vacancy was backfilled. However with the role being a part-time and very short-term role, the new appointee left prior to the end of the project having been offered a full-time permanent post elsewhere.

This has had a significant impact on our ability to engage not only with young people but also in the delivery of events to people of all ages. Appointing a permanent Learning and Outreach Officer role is an aspiration of our organisation.

Research requests continued to be received throughout the pandemic, and although this creates a large amount of work for our volunteers we recognise the importance and benefits of sharing our collection with researchers. We look to continue to build our relationships with academic institutions and other museums.

We continue to have excellent working relationships with the National Museums Scotland (NMS) and with several universities around the world. Collaborations have seen objects from our Natural History, Palaeontology, Ethnography and Archaeology collections being subject to research and collections advice. Ongoing collaborative projects include scanning of our Elgin reptiles from our Recognised Collection by NMS.

We continue to explore other avenues for promoting awareness of our collections for research purposes.

School group visits ceased in 2020, a result of the pandemic, and have not resumed since we are without a Learning and Outreach Officer. Our collection of object handling loan boxes are not currently in a condition for sharing, but this is a priority in coming months to address.

Use of the collection for research and learning purposes will continue to be encouraged, and new ways to highlight availability will be investigated.

6.8.3 Digitisation of the Collection

We continue to aspire to improve the digital cataloguing of our collection, and look to investigate further the options available for a SPECTRUM compliant computerised database. This is subject to identifying funding and staff resource to help assess the options and deliver the project.

In the coming years, we look to secure our digital position and to increase promotion of our existing online content as well as looking at ways to increase digital accessibility to our collection.

6.9 Security

The Museum buildings and collection are protected by an alarm system, which is subject to an annual service. There is CCTV coverage inside the Museum and for the exterior of the front of the main building. We also have a good relationship with the local Police force. Our Emergency Plan has continued to be kept up to date and is subject to review in 2022. The Health and Safety Policy will also be reviewed in 2022.

6.10 Tourism

To ensure that we are contributing to local and national tourism priorities, our aims and objectives take account of the Strategy for Tourism Development in Moray, The Moray Council's Cultural Strategy, the Scottish Government's Tourism Scotland 2020 policy and Visit Scotland's Tourism Development Framework (see Appendix 1).

We recognise the importance of the tourism sector to local economy, and to the Museum's economy, and the value of engaging with partners locally and nationally to help deliver tourism priorities. Elgin Museum is supported at a local level by Visit Moray Speyside Tourism DMO, which seeks to promote Moray as a visitor destination, and Embrace Elgin BID, which promotes and assists the economy, facilities, interests and environment of Elgin City Centre and its businesses. These local priorities are closely tied to the Museum's priorities and strategic aims. At a national level, we are supported by Visit Scotland and the Museum is a 4-star Visit Scotland rated attraction. The Museum is also part of the Moray Heritage Connections network, a membership organisation and support network for the heritage sector in Moray.

6.11 SWOT/PESTLE Analysis

A SWOT and PESTLE analysis have been undertaken to help with the development of this Forward Plan, to help identify the strengths and weaknesses of the Museum and to highlight the challenges and opportunities likely to be faced in the period covered by the forward plan. The exercise has been useful for the workforce in highlighting areas of success as well as areas for improvement, and has provided a good starting point for developing the Museum's Action Plan for the period of this Forward Plan.

6.11.1 SWOT Analysis for Elgin Museum

<p>Strengths</p> <ul style="list-style-type: none"> • Collections – quality and breadth, well maintained • Strong relationships with NMS, universities, MGS, other organisations • Success in attracting external funding • Committed and enthusiastic volunteers • Positive visitor feedback • Reputation • Independence • Supporting academic research 	<p>Weakness</p> <ul style="list-style-type: none"> • Staffing (paid) – small paid staff resource, limited capacity, unable to fund curator/manager post or Learning and Outreach Officer. • Limited availability of training & development for paid staff • Finance – lack of funding to appoint staff, to develop collection/displays, and to develop building stock to improve facilities • Dependence on external grant funding • Narrow audience demographic • Some of displays static / outdated • Reliance on volunteers • Limited time & resource available to deliver priorities, manage grants etc • Lack of appropriate storage • Database/catalogue • Location – on edge of declining town centre, limited car parking (now with fee), low frequency/reliability of public transport
<p>Opportunities</p> <ul style="list-style-type: none"> • Improve displays • External funding • Education, working with youth and older-age groups, taking museum out to schools and other groups (instead of them visiting) • Research potential • Inter-agency projects • Develop use of and improve building stock • Develop database/catalogue • Further exploration of digital opportunities • Sponsorship – of objects, exhibitions • Improve development and training opportunities for staff (paid and voluntary) 	<p>Threats</p> <ul style="list-style-type: none"> • Finance – lack of • Repercussion of Covid-19 pandemic • Impact of costs of living and fuel price crises • Losing volunteers • Maintaining a historic building stock, condition of building stock • Storage – lack of • Sustainability – staffing (paid and voluntary) • Reduction in available external funding • Reduction in visitor numbers

6.11.2 PESTLE Analysis for Elgin Museum

Political	<ul style="list-style-type: none"> • Changes in political priorities and interests • Lack of clarity from local authority: stated commitments to heritage tourism and education but lack of commitment to museums • Brexit – unknown implications and effects on economy, overseas visitors and researchers, political priorities • Uncertainty of Scottish political situation, possible third independence referendum, unknown impacts on economy • Increased promotion of the region through Visit Moray Speyside Tourism (DMO). Region is often excluded from national promotional campaigns/events. Lack of a clear Moray identity.
Economic	<ul style="list-style-type: none"> • Brexit impacts • Post Covid-19 impacts • UK Cost of Living crisis • Increasing energy costs • Impacts of mooted third independence referendum • Reduced support from local businesses due to political uncertainties and pressures on budgets • Increased competition for grants
Social	<ul style="list-style-type: none"> • Free entry has positive impact during difficult economic times (enables repeat visits) • Active retired often less willing to take on administrative 'work' tasks • Increased 'competition' for volunteers • Curriculum for Excellence, working with schools – engagement well received, but can be difficult to establish and retain • Challenge of retaining volunteers • Reliance on older community for volunteers and members, more available but lose through higher mortality rate • Rising retirement age means retired volunteers are older and may feel less motivated to take on responsible volunteer work • Visitors – can be challenging to attract new visitors, with changing interests and expectations • More local groups/organisation being established creating more opportunities for partnership working
Technological	<ul style="list-style-type: none"> • Continuing dependence upon IT • Budget pressures for upkeep of technologies – equipment, maintenance, training for staff (paid and voluntary)

	<ul style="list-style-type: none"> • Increased expectations form visitors for new digital content • Social media and website – successful, good mechanism for feedback, but time consuming, difficult to measure outcomes – more ‘followers’ does not equate to new volunteers or visitors or increases in donations
Legal	<ul style="list-style-type: none"> • Complexities of running small organisation is same as for larger organisation, but with less of a support network (keeping up to date with accounts, changes to pension scheme, personnel, Health & Safety etc) • Data Protection / GDPR – ongoing concern, lack of clarity around procedures and challenging for small organisation • Accreditation – time consuming, challenging for small organisation, pressure on volunteers, limitations in available guidance, implications of not complying
Environmental	<ul style="list-style-type: none"> • Climate Change – increased impact on fabric of historic building stock, and associated impact on collection/displays • Increasing energy costs • Increasing travel costs for staff, volunteers & visitors

7. Vision

As we look to the future, we must continue to develop and strengthen as we aim to increase our resilience and sustainability. The next five years will no doubt be challenging, with political and economic uncertainty and instability at the forefront of our minds. It is essential to our survival, however, that we do not lose focus of our purpose: to conserve and display the objects and archive in our care, to act as a focus for learning and enjoyment for all and to support the appreciation of the natural history, culture and heritage of Moray. Elgin Museum is currently the sole Accredited museum in Moray. We collectively feel the weight of responsibility that comes with this mantle, with the added pressure to ensure the continued operation of a Museum founded in 1843.

Elgin Museum’s vision is:

‘To protect, present and promote the heritage of Moray for the benefit of all.’

By 2026 we aim to have:

- increased the number of our visitors, members and volunteers
- progressed our Building Redevelopment Programme, by obtaining planning permission, funding and having started to deliver the building works

- appointed a Funding Development Officer to address urgent funding needs and help us progress our priority of financial sustainability
- investigated new sources of funding and financial support, including the potential for sponsorship (objects/displays, corporate/individual)
- increased financial resilience and sustainability, including a review of spending to identify areas where savings can be made
- continued to operate to Museums Galleries Scotland / industry standards in line with our Accredited status
- continued to offer a high-quality service to retain our existing audience and develop new audiences
- continued to maintain and develop our collections, and ensure their continued use in research and learning
- developed a staffing strategy, with an emphasis on succession planning, and improving training and development opportunities for our workforce (paid and unpaid)
- increased the digital access to our collection to improve accessibility

8. Aims & Objectives

Elgin Museum Aims	MGS National Strategy Aims**	Scottish Government National Outcomes**
Increase user numbers	2, 3, 4	2, 3, 5, 7
Improve access to, and promotion of, Moray's heritage	1, 2, 5, 6	2, 3, 5, 6, 11
Ensure the long-term care and display of our collections	1, 4, 5	3
Secure the future of the Museum buildings	4	3, 6
Improve long-term sustainability (finance, human, environment)	2, 3, 4, 5	3, 4, 7
Care for and develop our workforce	2, 3, 4	7
Provide an educational resource	1, 2, 4, 5	1, 2, 3, 5
Work with other organisations with overlapping aims	1, 2, 5, 6	3
Act as a focus for the receipt of objects from the Moray region	1, 2	3
Be the best museum heritage tourism experience in Moray	1, 2, 4	2, 3, 5, 6
**See Appendix 2 for details of MGS National Strategy Aims and Scottish Government National Outcomes		

The strategic aims for Elgin Museum to progress in the period to 2026 are those agreed under the previous Forward Plan.

These aims continue the good work already delivered by the Museum. They act as a strong platform on which the Museum can build and develop over the next 4 years to ensure the continued successful operation of the Museum.

The Strategic Aims and Objectives for Elgin Museum for the period to 2026 are:

1. Increase user numbers
 - 1a. Increase visitor numbers
 - 1b. Increase volunteer numbers
 - 1c. Increase Moray Society membership
 - 1d. Increase number of researchers
 - 1e. Increase number of group visits (school, student, local community, tourist)

2. Improve access to, and promotion of, Moray's heritage
 - 2a. Increase number and variety of events & activities
 - 2b. Increase Promotion of the Museum
 - 2c. Taking the Museum outside
 - 2d. Increase awareness of digital collection
 - 2e. Manage and maintain social media
 - 2f. Manage and maintain website
 - 2g. Review opportunities for in-person activities on-site

3. Ensure the long-term care and display of our collections
 - 3a. Accessioning backlog
 - 3b. Object care
 - 3c. Development of displays
 - 3d. Museum Catalogue and database
 - 3e. Recognised Collection development
 - 3f. Object storage – review of existing storage
 - 3g. Insurance of collection

4. Secure the future of the Museum buildings
 - 4a. Maintain the building stock
 - 4b. Be aware of climate change implications
 - 4c. Ensure Health & Safety requirements are managed

5. Improve long-term sustainability
 - 5a. Follow, review, develop Forward Plan and Action Plan
 - 5b. Improve financial position to ensure future sustainability
 - 5c. Increase retail opportunities
 - 5d. Sustainability of workforce resource

- 5e. Ensure sustainability of building stock
 - 5f. Emergency Plan
 - 5g. Environmental sustainability
 - 5h. Review of Society format
 - 5i. Continue to be an Accredited museum
 - 5j. Management of funded projects
6. Care for and develop our workforce
- 6a. Ensure appropriate management and development of paid staff
 - 6b. Ensure appropriate support for, and management of, volunteers
 - 6c. Assess training needs of the workforce (paid and unpaid)
 - 6d. Maintain standards, keep up to date
7. Provide an educational resource
- 7a. Interaction with schools and colleges
 - 7b. Increased interaction with local groups
 - 7c. Increased research opportunities
 - 7d. Educational opportunities through events and activities programme
8. Work with other organisations with overlapping aims
- 8a. Ensure that the Museums Strategic Aims and Objectives are in line with National and Local Policy
 - 8b. Maintain good relationship with National Museum of Scotland (NMS), Museums Galleries Scotland (MGS), and other museums
 - 8c. Continue to work with and support other local heritage groups and museums
 - 8d. Continue to work with and support the local voluntary sector
 - 8e. Continue to develop relationship with, and support the work of, Visit Moray Speyside Tourism DMO
 - 8f. Continue to develop relationship with, and support the work of, Visit Scotland
 - 8g. Continue to maintain existing, and develop new, relationships with Further Education Institutions
 - 8h. Continue to develop relationship with, and support the work of, Elgin BID
9. Act as a focus for the receipt of objects from the Moray region
- 9a. Maintain a good relationship with the Treasure Trove Unit (TTU)
 - 9b. Maintain good relationship with local Metal Detectorists
 - 9c. Continue to follow, review, develop our Collections Development Policy
 - 9d. Continue to operate Collections Management Group
 - 9e. Continue to collect items pertinent to Moray region

9f. Management of un-accessioned items from Moray identified through Inventory

10. Be the best museum heritage tourism experience in Moray
 - 10a. Improve consistency of customer service
 - 10b. Recording & using user/visitor engagement statistics
 - 10c. Increase global awareness of the Museum
 - 10d. Assess the needs of users and non-users
 - 10e. Ensure all interpretation and signage meets accessibility standards
 - 10f. Improve / enhance displays
 - 10g. Continue to meet Visitor Scotland visitor attraction standards to at least 4-star level

9. Resources

Having sufficient resources to ensure future operation continues to be a challenge for the Museum, given its small size and independent status as well as the ever changing political and economic climate. The heritage sector is a competitive market, and retaining existing audiences, whilst also attracting new audiences, requires considerable resource financially and in terms of staff time. The Covid-19 pandemic has not helped matters.

Over the coming years, the Museum will continue to explore ways of becoming more financially sustainable. Our expenditure and our income are both somewhat unpredictable making forward planning difficult. However, we must continue to closely monitor expenditure against income, and will look at alternative ways of monitoring this, such as the development of forward spending plans. Having received a grant from MGS early in 2022, we aim to appoint a fixed-term Funding Development Officer in 2022 to help address some of these known issues as well as exploring other areas for financial improvement

Another challenge lies in many of our grants and legacy donations being restricted for specific projects or tasks, limiting their use. In particular with legacy donations, these may not be in line with our needs in any given year or in line with our priorities. Consideration will be given to running specific fundraising campaigns to address priorities as identified in our Action Plan.

We must increase our visitor numbers and continue to offer an enjoyable and engaging visitor experience to encourage visitors to offer donations in lieu of entry fee. These donations are not restricted funds and contribute significantly to the day to day operation of the Museum.

We must also explore alternative ways of increasing our income, through sponsorship, increased external use of our building stock by community groups and individuals, increased membership of The Moray Society, and increased legacy donations. Competition for external grants is increasing, and we must look at new avenues of funding wherever possible.

We must also look to increase our staff resource, both paid and unpaid, and improve succession planning. Two key aims are to source funding to appoint a Museum Manager/Curator and to source funding to implement the Buildings Redevelopment Programme.

10. Action Plan

10.1 Action Plan 2019 (reviewed 2022)

The previous Action Plan was fully embraced or adopted and fell by the wayside somewhat during COVID-19. It has been reviewed in 2022, and below is a summary of key actions which were completed.

The previous Action Plan was fully embraced or adopted and fell by the wayside somewhat during COVID-19. It has been reviewed in 2022, and below is a summary of key actions which were completed.

- 1a: Increased opening hours – Sunday opening in peak summer months. This was trialled in 2019 and proved to be a success. During our limited opening in 2021 and on into 2022, we have focussed on weekend opening, and would look to continue with Sunday opening in the summer in future.
- 2d: increased awareness of digital collection, increased content creation & promotion of our YouTube Channel. As noted above, this was an area we developed successfully during 2020-21, increasing our content, view count and number of subscribers significantly. It is an area we must maintain and continue to develop.
- 3e: Recognised Collection development, Improvements to display and interpretation of Recognised palaeontology collection. This was achieved through the successful delivery of the *At the Water's Edge* exhibition and events programme, which include the installation of additional display cases. Feedback from visitors shows a desire for more of the geology collection to be displayed, and area which will continued to be explored.
- 3e: Recognised Collection development, Ensure retention of Recognised palaeontology Collection status. This was achieved during the lifetime of the previous Action Plan thanks to the hard work of the Museum's Geology Group.
- 4a: Maintain the building stock, complete a review of the condition of the building stock and formulate a 10-year management plan. The review was completed in 2019 and identified that critical works were required which could not be managed over a 10-year period. A further study and options appraisal were commissioned to outline proposals for a large package of works, attractive to funders, which will help create a more useable and more sustainable set of buildings which also provide opportunities for income generation. A plan has been agreed and is subject to ongoing discussions with the Moray Council planning Service and with HES prior to a formal planning application being submitted and funding sought.

10.2 Action Plan 2022

Elgin Museum is already set up and operated with the above aims in mind; the purpose of the Action Plan is to define how to further develop and improve the service provided and to ensure its long-term future and financial viability.

The Actions are given priority categories and target completion dates in terms of financial years where appropriate. Many are classified as 'ongoing', in that they are continually kept under review, with progress assessed each year. 'Target dates' refer to our financial year, which runs from 1st January to 31st December. The Action Plan is to be reviewed annually in January/February.

A new Action Plan has been produced for 2022 which we look to implement for the year ahead.

Key of People Responsible

Initial	Person	Position
AC	Activities, Marketing & Promotion Committee	
AW	Alison Wright	Volunteer, EMGG, CMG
BD	Bill Dalgarno	EMMC Convenor, Moray Society Membership Secretary, Volunteer, Trustee, EMMC, CMG, Line Manager to PM
CD	Canary Dwarf	Website provider
CH	Claire Herbert	Vice President of the Moray Society, Trustee, Volunteer, Website & Social Media Volunteer, AC, CMG
CMG	Collections Management Group	
DS	Donna Skelly	Trustee
EMGG	Elgin Museum Geology Group	
EMMC	Elgin Museum Management Committee	
FC	Finance Committee	
FDO	Funding Development Officer	
GH	Gayle Henderson	Volunteer, Retail (Shop) volunteer, Visitor Feedback Co-ordinator, EMMC, Hall hiring
GR	Graham Robertson	Moray Society Treasurer, Volunteer, Trustee, EMMC
HT	Heather Townsend	Museum Assistant (paid)
JT	Janet Trythall	Volunteer, Trustee, Geology Group, Archaeology Volunteer, AC, CMG, EMMC, Health & Safety, Line Manager to HT
LDN	LDN Architects	Architect for Museum Buildings
MSB	Moray Society Board	
PM	Peter Manson	Janitor (paid)
PS	Peggy Scott	Volunteer, Volunteer Mentor
SH1	Stuart Huyton	Volunteer, Emergency Plan coordinator
SH2	Stewart Halkett	Volunteer, AC

Action Plan 2022 - 2023				
Objective		Lead Person	Completion date	Performance indicators
AIM 1: Increase user numbers				
Objective	Action	Lead Person	Completion date	Performance indicators
1a. Increase visitor numbers	Continued promotion & awareness raising of Museum through local press outlets, local organisations, posters, coach companies, hotels and B&Bs.	AC	Ongoing	No. of visitors
	Increased promotion & awareness raising on social media and website	CH	Ongoing	No. of visitors
	Investigate alternative traditional promotional options (e.g. local press opportunities, advertisements e.g. through tourism media)	AC	Ongoing	No. of visitors
	Investigate alternative digital promotional options (e.g. GoogleAds)	CH	Ongoing	No. of visitors
1b. Increase volunteer numbers	Increased promotion & awareness raising of volunteer programme	AC, work with tsiMoray	Ongoing	No. of new volunteers

	Improved training and support for volunteers	PS	Ongoing	No. of volunteers No. of Training events
	Appointment of new Volunteer Mentor	EMMC	Completed July 2022	New Volunteer Mentor appointed
1c. Increase Moray Society membership	Increased promotion & awareness raising of The Moray Society	BD (and FDO)	Ongoing	No. of Society members
	Improved communication with existing society members & volunteers - schedule of regular Newsletters and cheery updates	BD / CH	Ongoing	No. of newsletters (as scheduled)
1d. Increase number of researchers	Increased promotion & awareness raising of collections	ALL	Ongoing	i. No. of researchers (recorded in red book) ii. No. of collaborative projects
	Respond to collaboration and access requests	ALL	Ongoing	i. Research responses for enquirers
1e. Increase number of group visits (school, student, local community, tourist)	Increased promotion & awareness raising of Museum to local schools, universities, community groups, heritage and special interest groups etc.	<i>TBC</i>	Ongoing	No. of group visits

	Investigate options to attract small tour groups (e.g. From local bus and taxi tour companies, tour operators)	AC / SH2	Ongoing	No. of group visits
AIM 2: Improve access to, and promotion of, Moray's heritage				
Objective	Action	Lead Person	Completion date	Performance indicators
2a. Increase number and variety of events & activities	Increase virtual activities on website & YouTube (family friendly)	AW/CH	Ongoing	i. No. of events delivered ii. Variety of events delivered iii. No. of web views of events
	Increase virtual activities on website & YouTube (adult focus)	CH/AC	Ongoing	i. No. of events delivered ii. Variety of events delivered iii. No. of web views of events
	Activities Committee to become more proactive (meet more regularly, more group discussion and share responsibility for delivery etc)	AC	Ongoing	i. No. of meetings ii. No. of active committee members
2b. Increase Promotion of the Museum	Continued promotion through tradition channels (local press, posters, keeping posters updated)	AC/ALL	Ongoing	No. of visitors
	Ensure all promotional material (digital and printed) meets accessibility standards and	ALL	Ongoing	Accessibility compliant material

	uses Museum poster template			
	Continued promotion on social media and website	CH	Ongoing	No. of visitors
	Explore expansion of Facebook presence	CH, AC	Ongoing	No. of Followers/likes
2c. Taking the Museum outside	Review and improve object handling loan boxes, including cataloguing of items	AW/CMG	September 2022	i. No. of object handling loan boxes ii. No. of times object handling loan boxes are borrowed
	Offer Museum events in the local area (e.g. walks, site tours) Continue to explore opportunities	AC/EMGG	Ongoing	no. of outside events
2d. Increase awareness of digital collection	Increased promotion of YouTube	CH / AC/ ALL	Ongoing	i. No. of followers ii. No. of views
	Creation of new content for YouTube	CH/ALL	Ongoing	i. No. of new videos ii. No. of followers iii. No. of views
2e. Manage and maintain social media	Increase number of social media followers	CH	Ongoing	No. of followers
	Increase engagement through social media	CH	Ongoing	No. of comments
	Develop Social Media Policy & strategy	CH	September 2022	Policy and Strategy developed

2f. Manage and maintain website	Continue to ensure website is updated and meets accessibility requirements	CH	Ongoing	No. of web users
	Continue to ensure website is operational and remains in Museum ownership	CH / CD	Ongoing	No. of web users
	Biannual review and refresh of online content	CH/AC	Ongoing	No. of web users
	Update GDPR web cookies policy	CH / CD	December 2022	Cookies policy implemented
2g. Review opportunities for in-person activities on-site	Keeping update to date of ongoing COVID-19 situation, investigate options for in-person on-site activities	AC	Ongoing	
<i>AIM 3: Ensure the long-term care and display of our collections</i>				
Objective	Action	Lead Person	Completion date	Performance indicators
3a. Accessioning backlog	Continue to address the backlog of accessioning work	HT/CMG	Ongoing	i. % of backlog addressed ii. Weekly worksheets to line manager
	Ongoing compliance with Documentation Procedural Manual, updating in line SPECTRUM updates	ALL/JT	Ongoing	
3b. Object care	Continued condition monitoring of objects and displays	HT/CMG	Ongoing	Condition of objects

	Identification of objects requiring conservation care	CMG/Inventory	Ongoing	i. Condition of objects ii. No of objects identified iii. No of objects conserved
	Continued environmental monitoring and actions	AW/CMG	Ongoing	Report to CMG meetings
	Identify new lead for environmental monitoring	CMG/EMMC	July 2022	New lead appointed
	Improve training for staff/volunteers on collections care, and documentation procedures	ALL/BD	Ongoing	No of training events attended
3c. Development of displays	Assess, review and refresh displays (permanent and temporary)	EMMC/CMG	Annually	Recommendations for displays
3d. Museum catalogue and database	Excel catalogue to continue to be updated	ALL (BD – Inventory 2021, HT – cataloguing)	Ongoing	Catalogue updated
	CMS - maintain progress towards transfer to a system compatible with in-house needs and external collaboration			
	Develop location & movement control for non-accessioned objects, material, archive	CMG	March 2023	

3e. Recognised Collection development	Completion of review and cataloguing of the geology/mineral Collection and archive	EMGG	Ongoing	Review and cataloguing completed
	Improvements to display and interpretation of Recognised palaeontology collection	EMGG	Ongoing	i. Improved display ii. improved interpretation
	Ensure retention of Recognised palaeontology Collection status	EMGG	Ongoing	i. Recognised Status Retained ii. Reports as requested by Recognition Scheme
	Collaboration with palaeontology research and museums sectors e.g. specimen scanning, DiSSCo (digitisation)	EMGG	Ongoing	
3f. Object storage – review of existing storage	Complete reorganisation of East Store begun in 2017 (including Location & Movement Control documentation)	Inventory / CMG	2023	i. Store reorganised ii. All object documentation updated
	Complete reorganisation of North Store begun in 2018 (including Location & Movement Control documentation)	Inventory / CMG	December 2022	i. Store reorganised ii. All object documentation updated

	Completion of Art Rail project. All artworks to be properly packed, documentation completed.	Inventory / CMG	December 2022	i. Art stored appropriately ii. All object documentation updated
3g. Insurance of collection	Ensure continued insurance of collection, including significant loans and objects offsite, employer's liability, buildings, offsite events	GR	Ongoing	Collection insured
	Update insurers during buildings redevelopment works	GR	Ongoing	
<i>AIM 4: Secure the future of the Museum buildings</i>				
Objective	Action	Lead Person	Completion date	Performance indicators
4a. Maintain the building stock	Complete the land registration process of Lecture Hall; safe storage of Museum deeds	DS	Ongoing	i. Completion of registration ii. MSB updated
	Investigate funding options for building repairs	CH	Ongoing	
	Carry out annual building health checks (in line with HES and SPAB guidance)	CH/GR	Ongoing	i. Annual building health report ii. MSB updated

	Ensure that maintenance is carried out in a conservation appropriate manner (in line with the buildings' category A listing status) using only traditional materials and appropriately skilled contractors/craftspeople – refer to the advice following CARS for trades	CH/GR	Ongoing	Building is maintained appropriately
	Submission and completion of Pre-application for Buildings redevelopment project	CH, LDN	July 2022	Pre-application process completed
	Submission and completion of Full planning application / LBC for Buildings redevelopment project	CH, LDN	December 2022	Planning application approved
	Investigate options for better management or removal of trees to the rear of the museum	GR	September 2022	Impact of trees on buildings reduced
	Update insurers during buildings redevelopment works	GR	Ongoing	

4b. Be aware of climate change implications on building stock	Monitor the condition of the buildings more closely, be aware of the potential negative impacts of climate change on the building stock	ALL	Ongoing	
4c. Ensure Health & Safety and Security requirements are managed	appoint professional tradespeople to undertake building maintenance where could be an H&S issue	ALL	Ongoing	
	Ensure PAT testing is carried out annually	BD	Ongoing	Completed PAT test
	Ensure CCTV is Operational & correct signage is in place and visible, ensure regular servicing is carried out.	BD/SH1	Ongoing	Operational CCTV
	Ensure Security System is operational (currently with Logic) ensure contract servicing carried out; review as required, keyholders listed with police, fire	BD/SH1	Ongoing	i. Operational Security System ii. Log reports

	Investigate options for connecting door between museum and Side Hall to allow access from Side Hall into Museum		December 2022	Replacement lock mechanisms in place
	Ensure Fire System is operational (currently with Chubb), ensure contract servicing carried out; review as required. keyholders listed with police, fire	BD	Ongoing	i. Operational Fire System ii. Log reports
	Ensure Emergency Plan is up to date	SH1, ALL	Ongoing	Active Emergency Plan
	Carry out regular fire extinguisher checks	TBC - BD	Ongoing	Functioning fire extinguishers in place (evidenced by record)
	Complete the update of the H&S policy	JT	December 2022	i. Operational H&S Policy in place, ii. Document circulated to EMMC & MSB iii. Ongoing H&S agenda item for EMMC & MSB iv. Document circulated to all volunteers.
	Carry out annual emergency lighting checks, annually by external	TBC - BD	Ongoing	i. Functioning emergency lighting ii. Log reports

	specialist and in between by internal volunteer.			
	Ensure keyholders are kept up to date of changes to alarm system, procedures	ALL	Ongoing	
AIM 5: Improve long-term sustainability				
Objective	Action	Lead Person	Completion date	Performance indicators
5a. Follow, review, develop Forward Plan and Action Plan	Ensure workforce (paid and unpaid) are aware of Forward Plan and Action Plan, including individual requirements for delivery of actions	BD/CH/JT, EMMC, ALL	Ongoing	Report to MSB
	Ensure the Action Plan is regularly reviewed and is developed annually to meet changing needs/situations	EMMC/MSB	Ongoing	i. Up to date Action Plan ii. Actions being implemented
5b. Improve financial position to ensure future sustainability	Source funding and appoint Funding Development Officer	JT/CH	April 2022	Funding received
	Continued management of accounts by Treasurer	GR	Ongoing	Up to date and accurate accounts

	Preparation of forward spending plans to assess funding shortfalls in advance and identify possible budget savings	GR, FC, FDO	October 2022	Creation of Financial Forward Plan
	Investigate options to increase income (e.g. sponsorship of object/displays, individual/corporate; increased revenue through use of building space; largescale fundraising events; crowdfunding for specific projects)	AC, FC, FDO	Ongoing / 2024	Implementation of new income generation models
	Continued investigation of grant-funding options by paid Funding Development Officer	FDO	Ongoing	i. No of grants applied for ii. No of grants received
5c. Increase retail opportunities	Annual assessment of stock	GH, GR, CH	Ongoing	
5d. Sustainability of workforce resource	Source funding for essential staff resource (Curator/manager, L&O)	FDO	2024	Funding for staff resources sourced

	Continued succession planning of workforce (paid and unpaid) EMMC and Moray Society Board	ALL	Ongoing	
	Increased promotion of opportunities and benefits of volunteering	AC, ALL	Ongoing	
	Investigation into funding opportunities for staff (paid/unpaid) training	FDO	2024	
5e. Ensure sustainability of building stock	Continued maintenance and management of building stock	CH / LDN	Ongoing	
5f. Emergency Plan	Complete review of Emergency Plan	SH1	September 2022	
	Ensure workforce, "role players" and emergency services are aware of Emergency Plan	SH1	Ongoing	
5g. Environmental sustainability	Continue with recycling programme in line with local availability	ALL	Ongoing	Reduction in landfill waste
	Review of cleaning products to minimise climate impact	EMMC/PM	October 2022	Use of eco-friendly cleaning products

	Review of materials used with collections in Museum	CMG	December 2022	Increased use of more eco-friendly materials, where possible / appropriate
	Review of energy and lighting use, investigate options for improvements and savings + carbon footprint / buildings	CH, LDN, GR	December 2022	
5h. Review of Society format	Consideration of alternative scheme name and format, improved membership offer, how to appeal to young audience, better incentives for membership	FDO, BD, MSB	Ongoing / 2024	i. No. of Society members ii. Broadened age range of Society members
5i. Continue to be an Accredited museum	Continue to operate to accreditation standards	ALL	Ongoing / 2025	EMMC and MSB Agenda standing items.
	Ensure workforce and trustees are aware of Accreditation (meaning and requirements)	ALL	Ongoing	
	Keep up to date with MGS/Arts Council England/SPECTRUM requirements	ALL		

5j. Management of funded projects	Funded projects will be in line with priorities identified through the Forward Plan and Action Plan. Projects diverting from these priorities must be approved by the Board.	ALL	Ongoing	Delivery of Museum's Action Plan
	Risk Registers and Lessons Learnt logs to be maintained throughout funded projects	ALL / Project Officers	Ongoing	i. Risk Register ii. Lessons Learnt Log iii. Improved monitoring of projects
	Moray Society Board to be provided with regular updates on all funded projects	ALL / Project Officers	Ongoing	i. MSB Updated ii. MSB Agenda standing item
	End of Project reviews with lesson learnt logs to be provided to Moray Society Board on completion of all projects	ALL / Project Officers	Ongoing	i. Review report ii. Increased awareness of problems/ issues/ challenges iii. improved planning for projects
AIM 6: Care for and develop our workforce				
Objective	Action	Lead Person	Completion date	Performance indicators
6a. Ensure appropriate management and development of paid staff	Increase regularity of employee review	BD, JT, CH (line managers)	Ongoing	No. of employee reviews

	Summary of employee reviews to be presented to Moray Society Board	BD, JT, CH (line managers)	Ongoing	i. No. of employee review summary reports ii. MSB Agenda standing item
	Encourage & support paid staff to maintain Personal Development Plans (PDP)	BD, JT, CH (line managers)	Ongoing	Staff have PDP
	Encourage & support paid staff to maintain Continuing Professional Development logs (CPD)	BD, JT, CH (line managers)	Ongoing	Staff have CPD logs
6b. Ensure appropriate support for, and management of, volunteers	Make sure volunteers are aware of existing support network	BD / PS	Ongoing	
	Appoint new Volunteer Mentor	JT	July 2022	New Volunteer Mentor appointed (PS)
	Improve channels for volunteer feedback and encourage openness (e.g. through end of season feedback form and pre-season update)		Ongoing	Increase in volunteer feedback

	Make sure volunteers with specific roles have signed agreements & are aware of line management support; ensure annual review of roles.	BD	Ongoing	
6c. Assess training needs of the workforce (paid and unpaid)	Encourage workforce feedback to highlight areas where they would like training	BD, JT, CH (line managers)	Ongoing	Increase in feedback
	Identify areas where training is required from user feedback	ALL	Ongoing	Training identified
	Circulate information regarding external training opportunities as and when identified	ALL	Ongoing	
	Workforce to maintain training records	ALL	Ongoing	Training logs maintained
6d Maintain standards, keep up to date	Ensure workforce (paid and unpaid) are aware of the Museum's plans and policies	BD, JT, CH (line managers), Vol. mentor	Ongoing	
	Ensure workforce (paid and unpaid) keep up to date with relevant sector policies, standards and practice	BD, JT, CH (line managers)	Ongoing	

AIM 7: Provide an educational resource				
Objective	Action	Lead Person	Completion date	Performance indicators
7a. Interaction with schools and colleges	Review and update object handling boxes. Ensure Covid H&S. Promote for use in classrooms etc		December 2022	i. No. of object handling boxes available ii. No of object handling boxes requested
7b. Increased interaction with local groups	Review and update object handling boxes. Ensure Covid H&S. Promote for use in classrooms etc		December 2022	i. No. of object handling boxes available ii. No of object handling boxes requested
7c. Increased research opportunities	Increased promotion & awareness raising of collections	EMGG, Archaeology Volunteer	Ongoing	No. of research requests/visits/papers
	Increased interaction with universities and other museums	EMGG, Archaeology Volunteer	Ongoing	No. of research requests/visits/papers
	Ensure Museum receives copy of research on completion / information to update Museum records	ALL	Ongoing	No. of research papers / articles etc received
	Ensure Museum receives a copy of any digital output (e.g. 3D model) of digital research.	ALL	Ongoing	No. of new models / videos
7d. Educational opportunities through events and activities programme	Continuation of digital annual lecture programme during ongoing pandemic	CH, AC	Ongoing	i. No. of lectures ii. No. of views

AIM 8: Work with other organisations with overlapping aims				
Objective	Action	Lead Person	Completion date	Performance indicators
8a. Ensure that the Museums Strategic Aims and Objectives are in line with National and Local Policy	Keep up to date with National and Local Policy	ALL	Ongoing	
8b. Maintain good relationship with National Museum of Scotland (NMS), Museums Galleries Scotland (MGS), and other museums	Continued communication, and continued operation in line with national standards and guidance	ALL	Ongoing	
	Investigation of options for loan exhibitions (including working with NE Concordat)	EMGG, Archaeology Volunteer	Ongoing	
8c. Continue to work with and support local heritage groups and museums	Continued membership of Moray Heritage Connections (MHC) (or its successor) and attendance at meetings	BD	Ongoing	
	Minutes from MHC meetings to be circulated in	BD	Ongoing	

	full to all EMMC members & Trustees			
	Continued membership of NESHN, with updates to EMMC as appropriate	AW	Ongoing	
	Continued membership of MHH	JT	Ongoing	
8d. Continue to work with and support the local voluntary sector	Continue to maintain good relationship with tsiMORAY and other voluntary organisations	EMMC	Ongoing	
8e. Continue to develop relationship with, and support the work of, Visit Moray Speyside DMO	Continued communication with VMS	EMMC	Ongoing	
	Continued operation in line with local tourism strategic priorities	ALL	Ongoing	
	Continued support and promotion of Moray as a tourism destination	ALL	Ongoing	
	Ensure web listing is up to date and upload of events to VMS website	CH	Ongoing	

8f. Continue to develop relationship with, and support the work of, Visit Scotland	Continued communication with Visit Scotland	CH/JT	Ongoing	
	Continued operation in line with national tourism strategic priorities	ALL	Ongoing	
	Ensure web listing is up to date and upload of events to VMS website	CH	Ongoing	
	Events and displays planned in line with National Themes, alternate years	EMMC	Ongoing	
8g. Continue to maintain existing, and develop new, relationships with Further Education Institutions	Continued communication, collaborative working where appropriate	ALL	Ongoing	
	Continue to explore and develop new contacts locally, nationally and internationally	ALL	Ongoing	

8h. Continue to develop relationship with, and support the work of, Elgin BID	Continued membership of Elgin BID. Participation in and promotion of Elgin BID events where appropriate.	EMMC	Ongoing	
<i>AIM 9: Act as a focus for the receipt of objects from the Moray region</i>				
Objective	Action	Lead Person	Completion date	Performance indicators
9a. Maintain a good relationship with the Treasure Trove Unit (TTU)	Continue to liaise with TTU, reporting objects, applications to TTU and NFA	HT/JT, CMG	Ongoing	
9b. Maintain good relationship with local Metal Detectorists	Continue to liaise with detectorists, offering identification services and acting as reporting channel to TTU	HT	Ongoing	i. Reports to CMG ii. No. of TTU visits to Elgin Museum
9c. Continue to follow, review, develop our Collections Development Policy	Ensure workforce is aware of and following policy	ALL	Ongoing	
	Review and develop policy as required	JT/CMG	Ongoing	
9d. Continue to operate Collections Management Group	Ensure CMG meet and communicate regularly	CMG	Ongoing	No. of CMG meetings
	Keep EMMC updated	CMG	Ongoing	Reports to EMMC

9e. Continue to collect items pertinent to Moray region	Continue to act on enquiries/offers through website/email.	CMG	Ongoing	No. of new items acquired
9f. Management of un-accessioned items from Moray identified through Inventory	Ensure any un-accessioned items identified during ongoing Inventories are accessioned, retained and recorded or disposed of as appropriate	CMG	Ongoing	i. No. of items accessioned ii. Inventory records completed
<i>AIM 10: Be the best museum heritage tourism experience in Moray</i>				
Objective	Action	Lead Person	Completion date	Performance indicators
10a. Improve consistency of customer service	Improved training opportunities for volunteers, training to be mandatory	EMMC	Ongoing	i. Visitor feedback ii. Visitor donations iii. retention of Visit Scotland 4-star rating
	Continued use of uniform for Visitor Services volunteers	ALL	Ongoing	i. Visitor feedback ii. retention of Visit Scotland 4-star rating
	Ensure visitor services volunteers are making visitors aware of all facilities (e.g. Covid H&S, QR codes, limited access to upstairs, toilets, walking stools, information on website/YouTube, hearing loop, wheelchairs)	ALL	Ongoing	i. Visitor feedback ii. retention of Visit Scotland 4-star rating

	Ensure a continued safe environment for visitors and volunteers through ongoing Covid-19 pandemic	EMMC	Ongoing	i. Visitor feedback ii. retention of Visit Scotland 4-star rating
10b. Recording & using user/visitor engagement statistics	Investigate a platform for an accessible record of all engagement statistics (in person & digital)	BD	Ongoing	
10c. Increased global awareness of the Museum	Increased promotion, increased partnership working	FDO, AC	Ongoing	
10d. Assess the needs of users and non-users	Annual surveys of users/non-users	EMMC	Ongoing	i. Annual survey completed ii. Responses of survey collated, circulated, fed into action plan
	Continued collation of visitor feedback		Ongoing	i. Feedback recorded ii. Feedback collated, circulated, fed into action plan
	Continued monitoring of online review platforms (Trip Advisor, Google)		Ongoing	i. Feedback recorded ii. Feedback collated, circulated, fed into action plan
10e. Ensure all interpretation and signage meets accessibility standards	Use of accessibility compliant museum templates for all interpretation	ALL	Ongoing	Accessible interpretation

	Ensure all signage is clear, simple, in sans serif font	ALL	Ongoing	clear signage in place throughout Museum
10f. Improve / enhance displays	Continue to offer fresh temporary displays in available display cases.	EMMC	Ongoing/Annually (to be agreed at 1st EMMC meeting of the year)	New temporary displays
	Improved lighting in Upstairs cases	CH	June 2022	New lighting operational
	Assess engagement statistics annually, and use these as a basis to develop the museum, including Visitors' Book comments	EMMC	Ongoing	
10g. Continue to meet Visit Scotland visitor attraction standards to at least 4-star level	Ensure consistent high standards of customer care	ALL	Ongoing	Retention of Visit Scotland 4-star rating
	Share VS feedback with volunteers, EMMC, MSB	BD	Ongoing	
	Ensure the Museum is consistently clean and accessible	ALL	Ongoing	Retention of Visit Scotland 4-star rating

Appendices

Appendix 1 Overview of National and Local Tourism Strategies

Scottish Government Tourism Strategy

The national tourism strategy, Scotland 2030, has been developed through an equal partnership between the Scottish Tourism Alliance, Scottish Government, VisitScotland, Scottish Enterprise, Highlands and Islands Enterprise and Skills Development Scotland. It has been guided by the Strategy Steering Group with representatives from industry, public bodies and the partner organisations.

Scotland Outlook 2030 has been informed by a robust evidence base gathered from all partners. This has included significant desk research from many sources, as well as independently commissioned reports. Over 2500 tourism leaders and stakeholders from Scotland's tourism industry have contributed to its development through dedicated events, workshops and an online survey.

A breadth of organisations from local authorities and Destination Management Organisations to business owners, operators and social enterprises have been involved in its development.

Scotland's future tourism strategy has the ambition to be the world leader in 21st century tourism.

The Vision – We will be the world leader in 21st century tourism.

The Mission – Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities and our environment.

Key Priorities – Our passionate people, our thriving places, our diverse businesses, our memorable experiences.

Our Commitments – For each of our key priorities we have an agreed set of commitments. These commitments will ensure that we deliver on our vision to be the world leader in 21st century tourism.

Visit Scotland's Strategic Framework 2021-2024

The Framework summarises the scope of the work that Visit Scotland will carry out between 2021 and 2024 to enable Scotland to be a leader in 21st century tourism with a thriving, responsible visitor economy. It will deliver a strategic and coordinated approach to supporting the rebuilding of the visitor economy in a responsible way, to ensure that tourism thrives. Through strategic leadership and industry partnerships, Visit Scotland will encourage a responsible approach to re-building and growing the value of tourism highlighting the benefits of tourism and events across Scotland in delivering the very best for our visitors, our businesses, our people, our communities and our environment.

The strategic pillars are:

1. We inspire life-long love affairs with Scotland: Building a responsible destination brand
2. Together, we build a responsible, quality product: Investing in Scotland's tourism and events communities
3. We use intelligence, tools and technology to drive: Facilitating collaboration and embracing change in support of a fairer, more responsible and inclusive visitor economy.

1. We inspire life-long love affairs with Scotland

What we do:

- Develop a rich understanding of key markets and traveller segments, of visitors to Scotland, and of those who engage through our multiple touchpoints to support the creation of relevant, compelling and effective activities
- Build long-term relationships with current and potential visitors and, by extension, influence investors, students and migrants; actively managing their lifetime worth to the country
- Build a global brand whose attributes will increase awareness and propensity with target audiences and grow our long-term, global reputation
- Put responsible tourism and climate change at the heart of all our marketing activity – to ensure that communities and visitors can build strong and harmonious relationships
- Harness our paid, earned and owned channels and work with partners to grow the contribution of the visitor economy to the overall Scottish economy
- Work with regional organisations and sector partners to promote a breadth of visitor experiences stimulating regional and seasonal spread of visitor spend
- Mobilise information and advice to support a safe visitor experience and encourage visitors to spend more time and money across Scotland
- Deliver unique and memorable sporting, cultural and business events, which showcase our talents and enhance our global reputation as the perfect stage

2. Together, we build a responsible, quality product and visitor experience

What we do:

- Support the industry to deliver the aspirations and objectives of “Outlook 2030”

- Engage with communities to rebuild tourism in a responsible and inclusive way ensuring that the infrastructure and welcome reflects and supports issues around over-demand, visitor management and Scotland's target of net zero by 2045
- Draw together enterprise investment that will enable destinations, product owners and sector specialists to invest in internationalisation
- Raise the profile of tourism and events as a force for economic and social good
- Lead industry efforts to create a quality, end to end, measurable customer experience that attracts visitors who are both responsible and high value
- Work with industry partners to distribute the economic and social benefits of tourism and events across the whole of Scotland in line with capacity
- Provide information, at the point of need, through our Information Centres, iKnow partners and digital assets
- Provide leadership and support to the industry in key strategic areas: insight, customer experience, distribution, events, marketing, and digital
- Support industry upskilling and digital adoption
- Research and analysis to build a robust picture of tourism performance and prospects in Scotland and a thorough understanding of responsible tourism indicators and issues

3. We use intelligence, tools and technology to drive innovation

What we do:

- Collaborate and empower industry innovators to bring technology and new ideas to market that will enhance people's real-life experiences
- Digitally enable the tourism and events industry
- Provide the intelligence and insight that enables strategic decision making
- Provide tools, platforms and talent that empower every DMO, local authority, event organiser and sector specialist to market and sell their own product
- Collaborate with destinations and key industry partners to develop low carbon products that will dynamically evolve our offer, underpinning our responsible ambitions towards Scotland's target of net zero by 2045
- Work closer with industry groups such as STERG and EIAG to develop new and innovative approaches and solutions for the tourism and events sector to adapt to the evolution of our sectors
- Deliver a comprehensive data and insight resource to support the responsible tourism ambitions and strategies, empowering the industry and government to make data-driven decisions on strategy, policy and investment

- Share relevant, rich insight to support businesses, partners and stakeholders in their strategic and business planning

The Strategy for Tourism Development in Moray

“In 2025, Moray will be known nationally and internationally as an exceptionally attractive destination for leisure and business visitors, offering memorable experiences, based on the area’s unique assets, including malt whisky, the heritage of Macbeth, its pure natural environment and superb food using local produce”

The strategy has been developed to help achieve this vision. It aims to maximise the economic, social and cultural benefits of tourism to Moray and spread the benefits across all sectors of the community.

The objectives of the Strategy are:

- To double the economic value of tourism
- To double the size of the tourism-related workforce, with at least 80% working all-year round, living locally and fully skilled for their job and trained in customer care
- To achieve annual occupancy of serviced accommodation rooms of at least 75%; and at least 65% occupancy of self-catering units

Moray Cultural Strategy 2014 – 2017 (note: no new strategy has been produced to date)

The vision of the Strategy is for Moray to be recognised as a place where:

- Creative activities benefit health and wellbeing.
- Cultural experiences are accessible in every community.
- Visitors encounter a dynamic and authentic cultural offer.
- Creative people and creative businesses thrive.

To achieve this vision and strengthen the values that underpin it, the following eight objectives have been identified.

- 01 Recognise the positive impact of creativity for everyone.
- 02 Encourage new ways to encounter creativity in the everyday.
- 03 Empower communities to establish sustainable cultural activities.
- 04 Develop tools to connect and communicate about cultural activity.
- 05 Grow quality cultural activities, festivals and events.
- 06 Make effective use of our built environment and natural heritage.
- 07 Ensure access to creative learning for all who seek it.
- 08 Help creative businesses to start, grow and develop.

Appendix 2 Overview of National Strategic Aims

Museums Galleries Scotland National Strategy Aims

AIM 1 Maximise the potential of collections and culture

AIM 2 Strengthen connections between museums, people and places to inspire greater public participation, learning and well-being

AIM 3 Empower a diverse workforce to increase their potential for the benefit of the sector and beyond

AIM 4 Forge a sustainable future for sector organisations and encourage a culture of enterprise

AIM 5 Foster a culture of collaboration, innovation and ambition

AIM 6 Develop a global perspective using Scotland's collections and culture

Scottish Government National Outcomes

Children and young people: we grew up loved, safe and respected so that we realise our full potential

Communities: we live in communities that are inclusive, empowered, resilient and safe

Culture: we are creative and our vibrant and diverse cultures are expressed and enjoyed widely

Economy: we have a globally competitive, entrepreneurial, inclusive and sustainable economy

Education: we are well educated, skilled and able to contribute to society

Environment: we value, enjoy, protect and enhance our environment

Fair Work and business: we have thriving and innovative businesses, with quality jobs and Fair Work for everyone

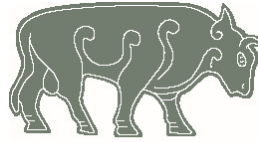
Health: we are healthy and active

International: we are open, connected and make a positive contribution internationally

Human rights: we respect, protect and fulfil human rights and live free from discrimination

Poverty: we tackle poverty by sharing opportunities, wealth and power more equally

Appendix 3 Forward Plan 2019-2023



THE MORAY
SOCIETY

ELGIN
MUSEUM

Elgin Museum Forward Plan 2019 - 2023

Approved: 04/12/2018
Review date: July 2023

*'To protect, present and promote the heritage of Moray for
the benefit of all.'*

Elgin Museum's Strategic Aims 2019 - 2023:

- Increase user numbers
- Improve access to, and promotion of, Moray's heritage
- Ensure the long-term care and display of our collections
- Secure the future of the Museum buildings
- Improve long-term sustainability (finance, human, environment)
- Care for and develop our workforce
- Provide an educational resource
- Work with other organisations with overlapping aims
- Act as a focus for the receipt of objects from the Moray region
- Be the best museum heritage tourism experience in Moray

Elgin Museum

Forward Plan 2019 - 2023

Name of museum: Elgin Museum
Name of governing body: The Moray Society
Date on which this policy was approved by governing body: 04/12/2018
Date at which this policy is due for review: July 2023

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1. Introduction

This Forward Plan is the result of a review of previous documentation, an assessment of visitor (and non-visitor) feedback, and consideration of best practice guidance for museums in Scotland. The aim is to create a plan which helps Elgin Museum perform to its best, and to ensure the future survival of the Museum and its collection for the enjoyment and education of future generations.

The Plan has been produced in consultation with our workforce (paid and unpaid), the Elgin Museum Management Committee (EMMC) and our governing body The Moray Society. The Forward Plan was adopted on 4th December 2018. It covers the period 1st January 2019 to 31st December 2023.

The Action Plan is subject to review on an annual basis. The review will be undertaken by the EMMC, with a report submitted to The Moray Society Board to agree any recommendations and approve the review. The Forward Plan will be reviewed 6 months prior to its end date (July 2023), unless otherwise specified by The Moray Society.

2. Statement of Purpose

The Moray Society, a membership organisation, owns and manages Elgin Museum. The purpose of Elgin Museum is to conserve and display the objects and archive in its care, to act as a focus for learning and enjoyment for all and to support the appreciation of the natural history, culture and heritage of Moray and to maintain the buildings in its ownership.

The Strategic Aims of Elgin Museum are:

- Increase user numbers
- Improve access to, and promotion of, Moray's heritage
- Ensure the long-term care and display of our collections
- Secure the future of the Museum buildings
- Improve long-term sustainability (finance, human, environment)
- Care for and develop our workforce
- Provide an educational resource
- Work with other organisations with overlapping aims
- Act as a focus for the receipt of objects from the Moray region
- Be the best museum heritage tourism experience in Moray

3. Previous Forward Plan

3.1 Review of Forward Plan 2014 - 2016

The previous Forward Plan, for the period 2014 – 2016, was presented in a different format to the present document, this being one of the outcomes of the review of the previous Plan. The new format of the Forward Plan is intended to create a more coherent and understandable document, using accessible language. It aims to more clearly present the position, purpose, aims and objectives of the Museum to those reading the document, and to those charged with delivering the aims and objectives.

The strategic aims of the Museum have also been subject to review, with a revised set of aims presented which more clearly and concisely illustrate to our workforce and audience the aspirations of the Museum. These aims are in line with Museums Galleries Scotland National Strategy Aims and the Scottish Government National Outcomes, as well as the overarching vision of The Moray Society.

The review of the 2014 – 2016 Forward Plan was delayed until 2018 due to shortage of staff resource; the aims and objectives of the Museum continued to be delivered however, and a key outcome of the present Forward Plan is to ensure it is read, understood and implemented by the Museum's workforce, and that the Action Plan and Forward Plan are reviewed according to timetable.

Many changes have taken place at the Museum, and in the wider environment (socially, politically and economically), since the implementation of the 2014 Forward Plan, most significant of which was the withdrawal of funding from the Local Authority. This brought into sharp focus the requirement for the Museum to become much more business-like in its approach to operation and delivery of services. Sustainability is critical for our continued operation – sustainability in our finances, workforce (paid and unpaid), in our building(s) and in our user appeal. Succession planning has also become, and continues to be, an important factor in planning our continued operation.

3.2 Key Achievements of Elgin Museum 2014 – 2018

Priorities naturally changed and developed during the period of the previous plan up to 2018. Many planned actions have been implemented, but for others we continue to carry them forward or place them 'on hold' for the foreseeable future, until budget and staff resource can be identified. Amongst success stories from the previous plan:

- The Museum underwent something of a digital transformation: a new ICT system was implemented, with additional equipment to help our workforce operate more efficiently; free publicly accessible Wi-Fi was introduced in the Museum gallery and lecture hall; credit card payments can now be accepted online and in our shop; and our social media presence has increased in number and popularity. We have more than doubled our number of Twitter followers since 2014 (to 1,154), created new Instagram and Facebook accounts, and established a YouTube account featuring films about Museum objects and events – all platforms which we look to continue to develop over the coming years.
- We welcomed a new part-time Learning and Access Officer (from January 2018) in a grant-funded post focusing on engagement with ‘teens and tweens’ having lost our previous Learning and Outreach Officer in early 2017.
- We broadened the range of our audience demographic through a more diverse programme of events and activities offered during 2017 under a grant-funded project to celebrate the Scottish Government’s Year of History, Heritage and Archaeology. We delivered over 80 events to over 2800 adults and children, reaching out to new audiences, and presenting the region’s heritage in new and creative ways, often quite different to anything we have offered before. In particular, taking the Museum out into the landscape, putting our collections into their landscape context and bringing the region’s heritage to life in an exciting and engaging way. Again, this has created a strong platform to continue to build on and develop as we plan our events programmes going forward.
- We undertook a programme of works to our building stock, comprising internal electrical and lighting improvements and extensive grant-funded works to the exterior of the main Museum building. These works have highlighted the requirement for further works, and the need for a long-term management plan for our building stock to allow us to better plan for required works (in term of sourcing funding, staff resource to oversee works, and timetabling of works to minimise impact on our users).

A summary of achievements since 2014 is included in the table below:

Year	Achievement
2014	Retained Museum Accreditation
2014	Introduced the Young Marvels junior membership club
2014	Winner of the Family Friendly Museum Award
2015	Delivered geology conference

2015	Reorganisation and rationalisation of the West Store (Geology collection). Appointment of temporary geology collection curatorial assistant to achieve this (Recognition funded).
2015	Continued to operate as a Museum after withdrawal of local authority financial support
2015	Formation of a Geology Group to oversee the Geology and Palaeontology collection (including our Recognised Collection)
2016	Moray Society Vice-President and Museum volunteer Janet Trythall shortlisted for Scottish Heritage Angels Lifetime Contribution Award
2016	Acquired (through Treasure Trove) a newly discovered Pictish stone (NFA funded). Redeveloped the display of carved stones (HLF funded).
2016	Created an Elgin Museum Sketchfab account to host 3D models of Museum objects
2017	Redisplayed our locally important log boat (HLF funded)
2017	Delivered a programme of events for the Scottish Government's Year of History, Heritage and Archaeology (HLF funded)
2017	Significantly increased membership of Young Marvels junior membership club
2017	Delivered archaeology conference, with printed proceedings
2017	Installed new ICT system
2017	Introduced free Wi-Fi throughout the Museum
2017	Created an Elgin Museum YouTube Channel
2018	Hosted the Pictish Arts Society annual conference
2018	Awarded Great War commemorative exhibit by the Armistice and Armed Forces Communities programme
2018	Introduced card payment facility in the Museum
2018	Completed first phase of Building restoration works (HLF and Leader Funded)
2018	Appointed new Learning & Access Officer (HLF funded)
2018	Introduced new Facebook and Instagram social media accounts

It is clear that we will continue to be faced with many challenges in the coming years, with many uncertainties ahead politically and financially. It is crucial therefore that we ensure our Forward Plan and Action Plan are realistic and attainable, that our workforce is supportive of the Plans, and that the Plans are implemented and managed more effectively. Our revised aims and objectives take account of feedback received from our users, and should ensure that we are meeting the needs of the Museum and its users in an efficient, sustainable and deliverable way.

4. Development of this Plan

The present Plan was created by reviewing the previous Forward Plan and analysing the Museum's current situation. It takes account of Museums Galleries Scotland's National Strategy, the Scottish Government's National Outcome, the Strategy for Tourism Development in Moray, The Moray Council's Cultural Strategy, Historic Environment Scotland's policies and strategies, the Moray Society's Constitution and other relevant documents.

The results of research into the views of users and non-users of the service were analysed and used to inform the aims, objectives and actions of the Museum for the next 5 years. Views of staff and volunteers have been sought on the proposed aims and how to achieve them, and the Plan has been reviewed by the Elgin Museum Management Committee and Moray Society Board.

5. Monitoring this Plan

Progress toward the actions identified in this Forward Plan will be monitored on an ongoing basis with an update report being prepared by the EMMC for the Moray Society trustees at their last meeting before the annual AGM. Milestones will be set for each of the objectives to assist with progress monitoring.

A three-year Action Plan is included with this Forward Plan, rather than a five-year Action Plan, as it is felt that this is a more appropriate timescale over which to plan. However, it is proposed that the Action Plan is subject to a full review twice annually by the EMMC, in the early part of the year (January/February, to address actions for the open season) and in the middle of the year (July/August to address actions for the closed season). An Action Plan for the period 2022 – 2023 will be produced in mid-2021 in line with this review programme. Any significant amendments to the Action Plan will be presented to the Moray Society trustees for approval. It is imperative that closer monitoring and delivery of the Action Plan is implemented by the workforce going forward.

A full review of the Forward Plan will be undertaken 6 months prior to its end date (c. July 2023) and action taken accordingly. Implementation of this plan will be the responsibility of the EMMC overseen and approved by The Moray Society Board.

6. Current Situation

Elgin Museum continues to be a well visited attraction, popular with locals, visitors to the area, school groups and researchers. The collection is well maintained and presented, and objects are frequently subject to research and analysis by visiting academics. However, limitations on finance and staffing continue to present challenges, as do local and national political uncertainties (including the Brexit outcome). It is essential that the Museum looks to prioritise its sustainability (financial and resources) in this challenging environment, and considers new and innovative solutions. We must also ensure that we maintain the high level of service currently offered to our audience and continue to be a respected and popular establishment.

6.1 Organisation Structure

Elgin Museum is an independent museum owned and operated by The Moray Society, a membership organisation. The Moray Society is also a company limited by guarantee and a registered Scottish charity. It has a Board of Directors, including a President, Vice-president and Treasurer/Company Secretary. The Moray Society is governed by a Constitution which outlines its role, remit and responsibility. Its primary functions are to safeguard the Museum and to ensure that the Museum and any associated activities contribute to the Society's aims to promote and conserve Moray's heritage.

Day-to-day management of the Museum and decision making is devolved by the Board to Elgin Museum Management Committee (EMMC). The EMMC reports to Board, who make the final approval of any plans and policies which affect the Museum.

6.2 Public Opening and Facilities

Elgin Museum is open to the public annually from April to October inclusive, but is accessible year-round by appointment. Entry is always free, although donations are welcomed. By offering free entry, we are accessible to all, regardless of income levels. This approach also results in frequent repeat visits.

During the summer season (generally 1st April to 31st October), opening hours are:

- Monday to Friday, 10 am to 5 pm
- Saturday, 11 am to 4 pm

Sunday opening was trialled in 2018 throughout July and August. Other Elgin tourism attractions are already open on Sundays (Elgin Cathedral, Johnston's

of Elgin) indicating there is a market for Sunday visitors. Although visitor numbers to the Museum were on the low-medium side during the trial period, as awareness of opening hours increases it may be that visitor numbers similarly increase. Subject to ongoing review, and volunteer commitment to the scheme, Sunday opening will be implemented during peak summer months in future.

Though closed during the winter season (generally 1st November to 31st March), the Museum can be, and is, still visited by groups and individuals by appointment. In order to minimise disruption during the open season and ensure a high-class visitor experience, our workforce undertakes a variety of essential works with the collections, the building and changes to displays during the closed period.

A wide range of events and activities is run throughout the year. Most are free entry, while some, like our lecture series, have a suggested donation entry fee – all donations received are used to help with the running of the Museum.

The Museum has two ground floor galleries and a first-floor gallery (accessible by staircase only, although information about items on display in the upper gallery is available in the lower gallery). The gallery areas combine a mix of permanent and temporary displays. The upper gallery also has a display area used for temporary art exhibitions.

Facilities at the Museum include a reception area and shop, an accessible toilet and a baby changing area. Guided tours are available on request, as are group visits – we also offer a service where we can take objects from the Museum out to local groups for object handling and discussion sessions. Appointments can be made to view or research objects in the Museum, including items not on display.

Our Lecture Hall is used for Museum events, activities and meetings, but is also used by other local community groups and can be hired out for private events. The Museum gallery areas can also be hired out for private events, for example weddings or corporate events.

6.3 Staffing

The Museum has a small but dedicated core of paid staff supported by volunteers.

Permanent paid staff comprise two part-time employees:

- Museum Assistant
- Janitor

Fixed-term contract paid staff comprise:

- Learning and Access Officer, part-time (January 2018 to December 2020, a grant funded post)

Temporary paid staff comprise:

- Cataloguing Assistant, full-time (November 2018 to March 2019)

Title	Funding Source	Hours/week	Nature of work
Museum Assistant	Museum funds	18	Primarily cataloguing and collections care; some general secretarial work
Janitor	Museum funds	Summer 13, Winter 9	Maintaining a clean and tidy Museum and stores, and in summer, also Saturday custodian. Fire alarm and appliance checks.
Learning and Access Officer (fixed-term contract)	HLF and Robertson Trust	21	Project coordinator Teens and Teens: Facilitate the engagement of the younger people of Moray with their heritage through outreach to schools and community groups and provision of meaningful access to the Museum and its collections; Facebook and Instagram
Cataloguing assistant (temporary)	Museum's Acquisition and Conservation Fund	F/T Mon-Fri, 5 th Nov 2018 to 31 st March 2019	Treasure Trove accessioning backlog.

Paid staff are line managed by the volunteer Museum Convenor (or other specified Elgin Museum Management Committee member), and are subject to annual reviews. Training is available in house, and externally when requested. Budget for external training is limited, and generally relies on external funding being available. New posts are generally identified on a project specific basis, to meet a particular need, and are usually only feasible if external funding can be sourced. When funding permits, new posts are advertised internally and externally, locally and nationally.

Volunteers undertake the remainder of roles required for the Museum to operate. This includes Custodian and Gallery Assistants; 'Behind the Scenes' work; organising, running and promoting events and activities; task specific

roles; our management committee; and our board of Trustees. Volunteers are coordinated by our Volunteer Mentor and Volunteer Rota Coordinator. A minimum of 4 volunteers per day is required for the Museum to open to the general public in the 'open season'.

Other task specific roles filled by volunteers include: buildings maintenance; archaeology collections; geology collections; fundraising; publicity and marketing; shop management; social media; and website editor (see the workforce flowchart below for more details). These volunteers report to the volunteer Museum Convenor and Elgin Museum Management Committee (EMMC), a voluntary committee. Along with the volunteer Finance Committee and volunteer Moray Society Membership Secretary, the EMMC reports to the Moray Society (TMS) Board of voluntary trustees, the MS Treasurer, MS Vice-president and MS President (all volunteer roles).

Training is available for all volunteers internally, and externally on request (when budget permits). New volunteers are recruited through word of mouth, through social media campaigns, through our website and through the local press and local voluntary organisations such as tsiMORAY.

All of our staff, whether paid or unpaid, are valuable members of Elgin Museum and are treated with the utmost care and respect. The Museum cannot function without its dedicated and enthusiastic workforce, and it is therefore essential that all staff feel valued and rewarded. With our limited budget, it is difficult for us to offer the development and training opportunities for staff which we would like. Succession planning can also be challenging. These are both issues which we look to address in the coming years in order to improve workforce morale and to increase the resilience of Elgin Museum to expected challenges.

The table below summarises our paid and voluntary workforce:

Role	Number
Museum Assistant (p/t) (Paid Staff)	1
Janitor (p/t) (Paid Staff)	1
Learning & Access Officer (p/t) (Paid Staff, grant funded 2018 - 2020)	1
Accessioning Backlog Assistant (Paid Staff, Nov 18 – March 19)	1
Volunteers (Front of House/gallery assistants, general)	65
Elgin Museum Management Committee	12
Moray Society Board Members (Trustees)	10

The structure of our paid and voluntary workforce is outlined in the workforce flowchart on the following page (figure 1):

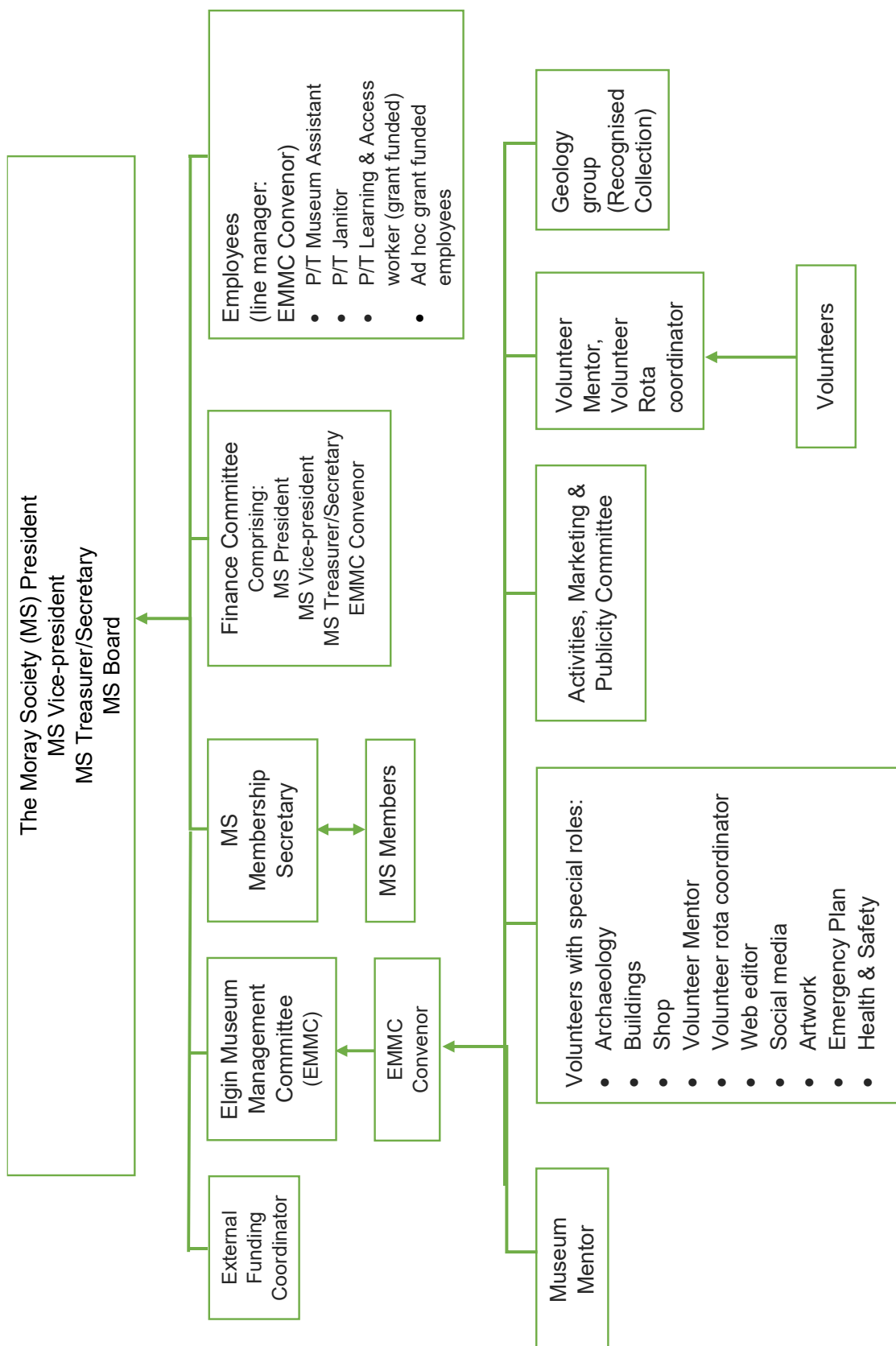


Figure 1: Elgin Museum Workforce Flowchart 2018

6.4 Audience

Elgin Museum is free to visit, meaning that we are accessible to all, regardless of income levels, and we are popular for repeat visits, especially with young families. Over the last 3-year period, we have received an average of 10,000 visitors each year. Our audience is recorded in four area categories: Moray area; Scotland; the rest of the UK; and the rest of the world. Visitor types include local residents, tourists, school/student/special interest groups and researchers. We record visitor demographics in the form of 'adult' and 'child', but do not record specific age range or any other social demographic information. Generally, the number of adult visitors is around three times the number of child visitors. Children under the age of 12 must be accompanied by an adult when visiting the Museum. We also have a junior membership club for under-18s, the Young Marvels, for which membership increased significantly in 2017. Established in 2014, current membership (as at 1st November 2018) stands at 167. The aim of the Young Marvels club is to grow interest, enthusiasm and continued engagement from a young age, creating a sense of 'ownership' for our younger visitors, and developing an audience for the future.

Year	Adults	Children	Total Visitors
2016	9,045	2,535	11,580
2017*	8,818	2,822	11,640
2018 (to 3rd November)	7,226	2,352	9,578
*Note: figures for 2017 include Museum events held in other locations (walks, training etc)			

In 2018, as a result of external building works and internal store reorganisation overrunning, the Museum reopened for its summer season 4 weeks later than usual. This, combined with lower attendance at family/children's activities, fewer events and activities having been offered in 2018, and the unseasonably good weather during the summer period, has seen a reduction in visitor numbers. However, to counter the additional closed month at the start of the season, Sunday opening was trialled during July and August 2018. Although visitor numbers to the Museum were on the low-medium side during the trial period, as awareness of opening hours increases it may be that visitor numbers similarly increase. Subject to review, and volunteer commitment to the scheme, Sunday opening may be implemented during peak summer months in future.

Entry to the Museum is free, and has been since 2013, however donations are welcomed, and encouraged, and contribute significantly to the Museum's budget as our primary source of independent income. The monies received as

donations help keep the Museum in operation, contributing towards daily running costs, building maintenance, collections care, displays and events.

On the whole, feedback received from visitors is positive. Visitor feedback is recorded internally, in our Visitors' Book and on our 'Comments Board', and the information collated by a volunteer for annual review. Any issues or negative comments are addressed at the time of submission where possible. We also receive feedback by email, in writing and via our social media channels. We are rated number 6 out of 24 'Things to do in Elgin' on Tripadvisor, with 90 reviews and average score of 4.5 out of 5. One negative review has been received via Tripadvisor, regarding access during the winter; the comment was responded to with the offer for the writer to visit at their convenience. We are also rated on Google, with 41 reviews and a score of 4.8 out of 5. We encourage visitors to review their visit whenever possible.

In 2017, an online customer satisfaction survey was undertaken in response to our conference and programme of events. The responses received were generally positive, with negatives relating to the availability of places (numbers had to be restricted) and the frequency – in effect, the audience wanted more events to happen so that more people could attend.

In 2018, we undertook an online customer satisfaction survey for visitors and non-visitors to the Museum. In total, 85 responses were received with 65% of responders having visited the Museum in 2018. The responses were generally positive, with some useful suggestions for improvements which correspond on the whole with those comments received through internal mechanisms (visitors' book, comments board).

The feedback received will be reviewed and used to help inform our Action Plans for the next three-year period. A summary of visitor feedback can be seen in Appendix 1.

By acting on comments received from visitors, continuing to broaden our events and activities programme (carrying on from the successful and more diverse programme in 2017), and improving our marketing strategy we aim to increase visitor numbers and broaden our audience range. We also seek to increase:

- membership of The Moray Society
- number of volunteers
- Museum users (i.e. not just those visiting, but those using our objects and spaces)
- Young Marvels membership (our junior membership club)

Budget limitations make this challenging, but by working with local agencies, such as Moray Speyside Tourism, and investigating new options, we look to improve our performance.

Our Learning and Access Officer, appointed in January 2018 is working closely with local schools and youth groups, targeting the notoriously difficult 'Teens and Tweens' age demographic, and making great progress in increasing awareness and engagement with a new Museum audience. It is hoped to continue to develop this in the coming years, as we seek to increase the number of teenagers and young adults visiting and/or engaging with the Museum. We also continue to develop relationships with local sensory deprivation groups, and our Learning and Access Officer has recently received training in this subject. We look to raise workforce awareness of the needs of those with sensory deprivation and investigate ways to create a welcoming environment for all visitors. Another potential user group identified is the refugee and displaced persons community in Moray. We will look to develop connections with this community, working closely with other local organisations, over the coming years.

The ability to appeal to and attract visitors and supporters is crucial to the Museum's survival, and is an area which will be a key focus for us over the next 5 years as we seek to increase user numbers and improve our sustainability.

6.5 Access

We aim to be as accessible as possible to users, but recognise our limitations. The Museum is housed in a Category A-listed building dating to the 19th Century, with displays housed on two floors. The design of the building is such that it is impossible for us to offer access to the upper floors to those with limited mobility; there is no capacity to introduce a lift or chair lift. However, we have ensured that our core displays are all on the ground floor with written information and images available of those items on display in the upper gallery. We do not presently offer any braille or tactile interpretation of our displays, but our gallery assistants can provide descriptions of displays on request. We can also take the Museum out to local community groups, offering object handling to those unable to visit the Museum in person. There is a hearing loop system in our reception/shop area and our lecture hall, and foreign language guides are available on request. We have also begun increasing our virtual museum environment with our Sketchfab account (for 3D models of Museum objects) and YouTube account (with films about Museum objects and events). We look to develop our digital presence in

coming years enabling those who cannot visit in person to experience the Museum from their own homes.

6.6 Environmental Sustainability

Elgin Museum and its governing body, The Moray Society, are committed to sustainability to ensure not only their long-term future but that of the environment in which they exist. It is seen as paramount that all resources, whether human, financial or relating to the environment are well cared for, that waste is minimised, and that the aspiration is maintained to improve year-on-year. A culture of sustainability will be promoted throughout the workforce. It is however acknowledged that the nature of the Category A listed building can impose certain constraints on options for energy conservation.

6.7 Finance

The Museum's financial position is relatively good, but fluid. Since the previous Forward Plan, local authority financial support has been withdrawn. Thankfully, the negative impact of this was balanced by a significant anonymous donation. We have also received a number of other large financial legacies and donations over the last 4 years, along with donations received from visitors to the Museum.

Financial Year	Gross Income	Total Expenditure
January 2015 – December 2015	£127,096.00	£115,257.00
January 2016 – December 2016	£152,998.00	£121,803.00
January 2017 – December 2017	£140,921.00	£223,650.00
January 2018 – December 2018 (estimated)	£150,000.00	£205,000.00
Note: the Museum holds only one bank account		

Our income has remained relatively steady over the last four years; however, the last 2 years have seen a marked increase in expenditure. For the 2017 financial year this is the result of a large impairment charge being incurred after a review of fixed asset values. For the 2018 period, the higher than usual expenditure is due to the substantial programme of essential repair works undertaken to the main Museum building. We anticipate further works will be required to maintain our building stock in good order. Better planning for this

work financially and in terms of timetabling of works is essential, and will form part of the Action Plan moving forward.

Visitor donations continue at a steady rate, and there has not been a decline in the Museum financial position since removing the entry fee. Visitor donations act as our primary stream of independent income and enable the day to day operation of the Museum. We have also received a number of modest donations from local firms, which all contribute to helping us continue to offer free entry.

The remainder of our income is through external grants for project specific work, and through dividends from investments. Our current Learning and Access Officer post, for example, is fully grant-funded, while the building repair works undertaken between 2017 and 2018 were partially grant funded. While we will continue explore other avenues of income, for example through sponsorship of objects or displays, at present we rely heavily on legacy donations and grants from external funders. We retain our investments at present as security for the future, but continue to monitor and review them in order to maximise growth.

Being a volunteer-run organisation limits the resource available to fully investigate alternative funding options, but financial sustainability will be high on our agenda over the coming years to ensure the future of the Museum. We must look to involve more of our workforce in this process, and look at new ways of generating incoming sustainably.

In terms of improvements over the last 4 years, we have facilitated online payments and introduced debit/credit card payments in the Museum through the use of the PayPal system. We look to expand on this by offering online book sales via our website by 2020. As a free Museum, we are also now eligible for the UK Government's VAT refund scheme for museums and galleries (VAT Notice 998). From 1st June 2017, we have been able to claim a refund of VAT on goods and services which are necessary for us to continue to operate as a free to visit Museum. Amongst other things, this enabled us to undertake a more extensive programme of building works than initially anticipated.

6.8 Collection

The Museum aims to appropriately conserve and display the objects and archive in its care and develop its collection in line with MGS guidance and policy and the Museum Association Code of Ethics. Our collection and collecting policy are governed by our Collections Development Policy (reviewed and updated 2018) and our Care and Conservation Plan (reviewed

and updated 2018). Authority for agreeing new acquisitions is delegated to the EMMC. Where payment is involved this must first be authorised by the Treasurer who will refer the matter to the Moray Society Trustees if considered necessary.

Description of Items	Number of Items (approximate, Data from National Audit 2002)	% of Collection
Archaeology	1,666	4.54
Foreign ethnography	8,66	2.36
Geology	1,642	4.48
Natural history*	11,926	32.53
Social history	20,560	56.09
Total	36,660	100

***Note: this number includes multiples of *butterflies and moths*. These figures are now under review for disposal as the collection is remounted.**

It is estimated that 20% of the Museum's collection are currently on display. This includes 28 items designated as National Audit 'Star' Items. We also hold 'Recognised Collection' status for our palaeontology collection and its archive, granted in 2008.

The purpose of the Museum's collection is to be a focus for learning and for enjoyment, and to help our audience to experience and understand the natural history, culture and heritage of Moray. Our collecting policy has developed considerably over time, but our current policy can be summarised as follows:

- to preserve important material for the benefit of Moray and the wider community
- to build on the existing strengths of the collections
- to collect material to support teaching, research and public engagement
- to collect material specifically relating to the Moray region

6.8.1 Interpretation and Displays

On the whole, feedback from visitors is that our displays are informative and present the objects well. Interpretation is produced in line with accessibility guidance. Feedback over the last 4 years has highlighted that interpretation is an area which might benefit from some improvement, in terms of how and where information is presented. This is an issue which will be investigated over the period of this Forward Plan.

Issues around the lighting of displays has also been raised, and works to address this have already been undertaken. Further improvements will be looked at where possible.

Some displays would benefit from being updated, for example our display of the 'Modern' period in the story of Moray. Visitor feedback has also indicated a desire to see more of our palaeontology and archaeology collections on display. Improvements to our displays in these areas are ongoing aspirations, limited by funding and staff resource. However, we will continue to investigate options with the ongoing aim of offering an engaging and enjoyable visitor experience.

6.8.2 Research and Learning Opportunities

Research requests are frequent, but more are always welcomed as the positive benefits of new research of the collection are recognised. It is also helpful to build relationships with academic institutions and other museums. This can lead to an exchange of information and resource – being able to display objects from other collections, or for our collections to go on display elsewhere; both excellent methods for raising awareness of Elgin Museum. In recent years, the results of this research have also been presented at conferences and in lectures hosted by Elgin Museum.

We have excellent working relationships with several universities around the world and with the National Museums Scotland (NMS). Collaborations have seen objects from our Natural History, Palaeontology, Ethnography and Archaeology collections being subject to research and collections advice. Ongoing collaborative projects include scanning of our Elgin reptiles from our Recognised Collection by NMS.

We continue to explore other avenues for promoting awareness of our collections for research purposes.

We also make our collection available for learning purposes for schools and other groups. This can be through schools or groups visiting the Museum to view objects (including those not normally on display) as well as through object handling (of real and replica objects, under supervision). Items can also be taken out to schools or groups to view and/or handle. Use of the collection for research and learning purposes will continue to be encouraged, and new ways to highlight availability will be investigated.

For 2018/19 we are also hosting a Skills Development Scotland Foundation Apprentice. We look to continue to explore opportunities to offer such placements in future.

6.8.3 Digitisation of the Collection

Digital presentation of the collection is an aspiration, with small inroads having been made over the last 4 years. We would not seek to make our entire collection digitally accessible, but by presenting select 'highlight' items we improve accessibility for those unable to visit in person, raise awareness of the Museum and reach out to new audiences less engaged with the traditional museum model.

To this end, a 3D model of the Dandaleith Stone (a carved Pictish stone) can be viewed virtually on our Sketchfab page (https://sketchfab.com/elgin_museum) which was established in 2016. To date, the model has been viewed 2,900 times. Request to scan objects are becoming more common; in future, as part of the permission for scanning, a request will be made for copies of the models created to be provided to the Museum for upload online.

In 2017, as part of a grant-funded programme, we commissioned 11 short films to highlight items from the collection. These films feature Museum volunteers and visiting experts talking about archaeological objects, and can be viewed on our YouTube channel (<https://www.youtube.com/channel/UCqVYIHX1wwQUPOcJdVljb7g>). Here you can also view a session from our 2017 archaeology conference and highlights from three of our events which took the Museum out into the landscape. Since being uploaded in mid-late 2017, the 17 films have been watched over 2000 times.

We also aspire to improve the digital cataloguing of our collection, and look to investigate further the options available for a SPECTRUM compliant computerised database. This is subject to identifying funding and staff resource to help assess the options and deliver the project.

In the coming years, we look to secure our digital position and to increase promotion of our existing online content as well as looking at ways to increase digital accessibility to our collection.

6.9 Security

The Museum buildings and collection are protected by an alarm system, which is subject to an annual service. There is also CCTV coverage inside the

Museum and for the exterior of the front of the main building. We also have a good relationship with the local Police force.

Our Emergency Plan has been reviewed in 2018, which included an evaluation of the security of the site by the local Police and for fire safety by Healthy Working Lives Scotland. Procedures have been updated and a more comprehensive plan created. More details can be viewed in our Emergency Plan. The Health and Safety Policy has also been reviewed in 2018.

6.10 Tourism

To ensure that we are contributing to local and national tourism priorities, our aims and objectives take account of the Strategy for Tourism Development in Moray, The Moray Council's Cultural Strategy, the Scottish Government's Tourism Scotland 2020 policy and Visit Scotland's Tourism Development Framework (see Appendix 2).

We recognise the importance of the tourism sector to local economy, and to the Museum's economy, and the value of engaging with partners locally and nationally to help deliver tourism priorities. Elgin Museum is supported at a local level by Moray Speyside Tourism DMO, which seeks to promote Moray as a visitor destination, and Elgin BID, which promotes and assists the economy, facilities, interests and environment of Elgin City Centre and its businesses. These local priorities closely tied to the Museum's priorities and strategic aims. At a national level, we are supported by Visit Scotland and the Museum is a 4-star Visit Scotland rated attraction. The Museum is also part of the Moray Heritage Connections network, a membership organisation and support network for the heritage sector in Moray.

In recent years, we have supported the Moray Council's Castle to Cathedral to Cashmere project. This project has promoted the cultural heritage and social history of Elgin through a series of events and a trail to encourage local interest as well as visitors from outside the region. We continue to support the Moray Council and the Moray Economic Partnership in their development of culture and tourism initiatives. At present, the 'Discover Moray's Great Places' project is in its early stages. It aims to explore opportunities to enhance the heritage tourism potential of the region, something inherently linked to the core aims of Elgin Museum.

In line with Theme 6 (Heritage & Culture) of Visit Scotland's Tourism Development Framework aim of Providing Authentic Experiences, one of the Museum's strategic aims for the next five-year period is to '*Be the best museum heritage tourism experience in Moray*'. This is an ambitious aim, but one we feel we are well on the way towards delivering, based on current visitor feedback. We have identified key areas for improvement to help

achieve this aim: improving the consistency of customer service, enhancing displays, increasing promotion, increasing awareness of our digital displays (YouTube, Sketchfab, website) and continuing to offer a wide range of special events. These areas of improvement tie in with the main priorities of the Scottish Government's Tourism Scotland 2020 policy.

6.11 SWOT/PESTLE Analysis

A SWOT and PESTLE analysis have been undertaken to help with the development of this Forward Plan, to help identify the strengths and weaknesses of the Museum and to highlight the challenges and opportunities likely to be faced in the period covered by the forward plan. The exercise has been useful for the workforce in highlighting areas of success as well as areas for improvement, and has provided a good starting point for developing the Museum's Action Plan for the period of this Forward Plan.

6.11.1 SWOT Analysis for Elgin Museum

<p>Strengths</p> <ul style="list-style-type: none"> • Staff – hard working, committed • Collections – quality and breadth, well maintained • Strong relationships with NMS, universities, MGS, other organisations • Success in attracting external funding • Committed and enthusiastic volunteers • Consistent visitor numbers • Positive visitor feedback • Events programme – well attended, good feedback • Young Marvels club – increased membership • Political support (from MP, MSP) • Reputation • Independence • Supporting academic research 	<p>Weakness</p> <ul style="list-style-type: none"> • Staffing (paid) – small paid staff resource, limited capacity, unable to fund curator/manager post. • Limited availability of training & development for paid staff • Finance – lack of funding to appoint staff, to develop collection/displays, and to develop building stock to improve facilities • Dependence on external project funding • Lack of local authority support • Narrow audience demographic • Some of displays static / outdated • Reliance on volunteers • Lack of appropriate storage • Database/catalogue • Location – on edge of declining town centre, limited car parking (now with fee), low frequency/reliability of public transport
<p>Opportunities</p> <ul style="list-style-type: none"> • Improve displays • External funding • Education, working with youth groups, taking museum out to schools (instead of them visiting) • Research potential • Inter-agency projects • Develop use of and improve building stock • Develop database/catalogue • Further exploration of digital opportunities • Increased summer opening hours • Sponsorship – of objects, exhibitions • Improve development and training opportunities for staff (paid and voluntary) 	<p>Threats</p> <ul style="list-style-type: none"> • Finance – lack of • Losing volunteers • Maintaining a historic building stock, condition of building stock • Storage – lack of • Sustainability – staffing (paid and voluntary) • Reduction in available external funding • Increased public transport costs, increased parking charges • Public spending cuts – reduction in schools able to fund visits to museum • Reduction in visitor numbers • Local authority budget cuts

6.11.2 PESTLE Analysis for Elgin Museum

Political	<ul style="list-style-type: none"> • Changes in political priorities and interests • Lack of clarity from local authority: stated commitments to heritage tourism and education but lack of commitment to museums • Brexit – unknown implications and effects on economy, overseas visitors and researchers, political priorities • Uncertainty of Scottish political situation, possible second independence referendum, unknown impacts on economy • Increased promotion of the region through Moray Speyside Tourism (DMO), lack of support from local authority. Region is often excluded from national promotional campaigns/events. Lack of a clear Moray identity. • MOD reviews and impact on Moray – fluctuating, some losses some gains
Economic	<ul style="list-style-type: none"> • Brexit impacts • Impacts of mooted second independence referendum • Local authority budget cuts (impact already felt through increased parking charges), reduction in promotion of tourism, possible increase in charges for Council services • Increasing energy costs • No financial support from local authority • Reduced support from local businesses due to political uncertainties and pressures on budgets
Social	<ul style="list-style-type: none"> • Free entry has positive impact during difficult economic times (enables repeat visits) • Active retired often less willing to take on administrative 'work' tasks • More reliance on community to deliver traditionally local authority services • Increased 'competition' for volunteers • Curriculum for Excellence, working with schools – engagement well received, but can be difficult to establish and retain • Increased unemployment / part time workers may increase volunteer pool • Challenge of retaining volunteers • Reliance on older community for volunteers and members, more available but lose through higher mortality rate

	<ul style="list-style-type: none"> • Rising retirement age means retired volunteers are older and may feel less motivated to take on responsible volunteer work • Visitors – can be challenging to attract new visitors, with changing interests and expectations • More local groups/organisation being established creating more opportunities for partnership working
Technological	<ul style="list-style-type: none"> • Continuing dependence upon IT • Budget pressures for upkeep of technologies – equipment, maintenance, training for staff (paid and voluntary) • Increased expectations form visitors for new digital content • Increased expectation of non-visitors for free digital content – costs to produce, no financial return to museums, difficult to measure other outcomes (do visitor / volunteer numbers increase?) • Social media and website – successful, good mechanism for feedback, but time consuming, training required, difficult to measure outcomes – more ‘followers’ does not equate to new volunteers or visitors
Legal	<ul style="list-style-type: none"> • Complexities of running small organisation is same as for larger organisation, but with less of a support network (keeping up to date with accounts, changes to pension scheme, personnel, Health & Safety etc) • Data Protection / GDPR – ongoing concern, lack of clarity around procedures and challenging for small organisation • Accreditation – time consuming, challenging for small organisation, pressure on volunteers, limitations in available guidance, implications of not complying
Environmental	<ul style="list-style-type: none"> • Climate Change – increased impact on fabric of historic building stock, and associated impact on collection/displays • Increasing energy costs • Increasing travel costs for staff, volunteers & visitors

7. Vision

Over the last 4 years, Elgin Museum has by circumstance had to become more self-sustaining and financially resilient. Financial support from the local authority has been withdrawn, but thanks to generous supporters the Museum has continued to operate. We have made great inroads into broadening our audience demographic, continue to receive positive visitor feedback, and have continued to act as a focus for academic research and learning.

As we look to the future, these are areas that we must continue to develop and strengthen, as we aim to increase our resilience and sustainability. The next five years will no doubt be challenging, with political and economic uncertainty and instability at the forefront of our minds. It is essential to our survival, however, that we do not lose focus of our purpose: to conserve and display the objects and archive in our care, to act as a focus for learning and enjoyment for all and to support the appreciation of the natural history, culture and heritage of Moray.

Elgin Museum's vision is:

'To protect, present and promote the heritage of Moray for the benefit of all.'

By 2021 we will have:

- increased the number of our visitors, members and volunteers
- enhanced and developed our learning and outreach programme
- increased opportunities for staff training and development (paid and unpaid staff)
- completed a full review of the Museum's building stock and developed a 10-year management plan
- undertaken an options appraisal and feasibility study on our building stock to assess potential redevelopment opportunities to increase accessibility, usability, improve functionality and facilitate the long-term security of the Museum
- continued to operate to Museums Galleries Scotland / industry standards in line with our Accredited status.
- formulated a forward staffing plan and sourced appropriate funding to address any essential posts identified

By 2023 we must:

- ensure that we continue to offer the same high-quality service we have in the past in order to retain our existing audience and develop new audiences
- continue to maintain and develop our collection, and ensure their continued use in research and learning
- develop a staffing strategy, with an emphasis on succession planning, and improving training and development opportunities for our workforce (paid and unpaid)
- investigate new sources of funding and financial support, including the potential for sponsorship (objects/displays, corporate/individual)

- retain the Recognised Collection status of our palaeontology collection, and investigated the potential to nominate our archaeology collection for Recognised status
- refresh displays to ensure a continued place of interest for repeat visitors as well as new
- increase financial resilience and sustainability, including a review of spending to identify areas where savings can be made
- increase the digital access to our collection to improve accessibility.

8. Aims & Objectives

Elgin Museum Aims	MGS National Strategy Aims**	Scottish Government National Outcomes**
Increase user numbers	2, 3, 4	-
Improve access to, and promotion of, Moray's heritage	1, 2, 4, 5	3
Ensure the long-term care and display of our collections	1, 2, 4, 5	-
Secure the future of the Museum buildings	4	12
Improve long-term sustainability (finance, human, environment)	2, 3, 4, 5	11, 12
Care for and develop our workforce	2, 3, 5	2, 3, 4, 11
Provide an educational resource	1, 2, 5	3, 4
Work with other organisations with overlapping aims	1, 2, 5	3
Act as a focus for the receipt of objects from the Moray region	1, 2	-
Be the best museum heritage tourism experience in Moray	1, 2, 4	-
**See Appendix 3 for details of MGS National Strategy Aims and Scottish Government National Outcomes		

The strategic aims for Elgin Museum for the next 3-year period have taken into consideration a number of factors, including: the main purpose of The Moray Society, the vision of Elgin Museum, the views of our workforce, customer feedback and local and national strategies of relevant organisations. The aims are intended to be more focussed, and worded in such a way as to be more clearly understood by our workforce and our audience. It is especially important that our workforce understands and supports our aims – without buy-in from our workforce (paid and unpaid), the aims and objectives cannot be achieved.

These aims continue the good work already delivered by the Museum. They act as a strong platform on which the Museum can build and develop over the next 5 years to ensure the continued successful operation of the Museum.

The Strategic Aims and Objectives for Elgin Museum for the period 2019-2023 are:

1. Increase user numbers
 - 1a. Increase visitor numbers
 - 1b. Increase volunteer numbers
 - 1c. Increase Moray Society membership
 - 1d. Increase Young Marvels membership
 - 1e. Increase use of building stock
 - 1f. Increase number of researchers
 - 1g. Increase number of group visits (school, student, local community, tourist)

2. Improve access to, and promotion of, Moray's heritage
 - 2a. Increase number and variety of events & activities
 - 2b. Increase Promotion
 - 2c. Taking the Museum outside
 - 2d. Increase awareness of digital collection
 - 2e. Manage and maintain social media
 - 2f. Manage and maintain website

3. Ensure the long-term care and display of our collections
 - 3a. Accessioning backlog
 - 3b. Object care
 - 3c. Development of displays
 - 3d. Museum Catalogue and database
 - 3e. Recognised Collection development
 - 3f. Object storage – review of existing storage
 - 3g. Insurance of collection

4. Secure the future of the Museum buildings
 - 4a. Maintain the building stock
 - 4b. Be aware of climate change implications
 - 4c. Ensure Health & Safety requirements are managed

5. Improve long-term sustainability
 - 5a. Follow, review, develop Forward Plan and Action Plan
 - 5b. Improve financial position to ensure future sustainability
 - 5c. Increase retail opportunities
 - 5d. Sustainability of workforce resource

- 5e. Ensure sustainability of building stock
 - 5f. Emergency Plan
 - 5g. Environmental sustainability
 - 5h. Review of Society format
 - 5i. Continue to be an Accredited museum
 - 5j. Management of funded projects
6. Care for and develop our workforce
- 6a. Ensure appropriate management and development of paid staff
 - 6b. Ensure appropriate support for, and management of, volunteers
 - 6c. Assess training needs of the workforce (paid and unpaid)
 - 6d. Identify funding sources for training
 - 6e. Maintain standards, keep up to date
7. Provide an educational resource
- 7a. Interaction with schools and colleges
 - 7b. Increased interaction with local groups including youth groups
 - 7c. Increased research opportunities
 - 7d. Educational opportunities through events and activities programme
8. Work with other organisations with overlapping aims
- 8a. Ensure that the Museums Strategic Aims and Objectives are in line with National and Local Policy
 - 8b. Maintain good relationship with National Museum of Scotland (NMS), Museums Galleries Scotland (MGS), and other museums
 - 8c. Continue to work with and support other local heritage groups and museums
 - 8d. Continue to work with and support the local voluntary sector
 - 8e. Continue to develop relationship with, and support the work of, Moray Speyside Tourism DMO
 - 8f. Continue to develop relationship with, and support the work of, Visit Scotland
 - 8g. Continue to maintain existing, and develop new, relationships with Further Education Institutions (universities, colleges etc)
9. Act as a focus for the receipt of objects from the Moray region
- 9a. Maintain a good relationship with the Treasure Trove (TT) unit
 - 9b. Maintain good relationship with local Metal Detectorists
 - 9c. Continue to follow, review, develop our Collections Development Policy
10. Be the best museum heritage tourism experience in Moray
- 10a. Improve consistency of customer service
 - 10b. Increase global awareness of the Museum

- 10c. Enhanced events programme
- 10d. Assess the needs of users and non-users
- 10e. Improve / enhance interpretation and signage (internal and external)
- 10f. Improve / enhance displays
- 10g. Continue to meet Visitor Scotland visitor attraction standards to at least 4-star level

9. Resources

Having sufficient resources to ensure future operation continues to be a challenge for the Museum, given its small size and independent status as well as the ever changing political and economic climate. The heritage sector is a competitive market, and retaining existing audiences, whilst also attracting new audiences, requires considerable resource financially and in terms of staff time.

Over the coming years, the Museum will continue to explore ways of becoming more financially sustainable. Our expenditure and our income are both somewhat unpredictable making forward planning difficult. However, we must continue to closely monitor expenditure against income, and will look at alternative ways of monitoring this, such as the development of forward spending plans.

Another challenge lies in many of our grants and legacy donations being restricted for specific projects or tasks, limiting their use. In particular with legacy donations, these may not be in line with our needs in any given year or in line with our priorities. Consideration will be given to running specific fundraising campaigns to address priorities as identified in our Action Plan.

We must increase our visitor numbers and continue to offer an enjoyable and engaging visitor experience to encourage visitors to offer donations in lieu of entry fee. These donations are not restricted funds, and contribute significantly to the day to day operation of the Museum.

We must also explore alternative ways of increasing our income, through sponsorship, increased external use of our building stock by community groups and individuals, increased subscriptions to our membership society, and increased legacy donations. Competition for external grants is increasing, and we must look at new avenues of funding wherever possible.

We must also look to increase our staff resource, both paid and unpaid, and improve succession planning. A key aim is source funding to appoint a

Museum Manager/Curator within the period of this Forward Plan to oversee the day to day operation of the Museum, freeing up volunteers to undertake other essential tasks which will help secure the Museum's future.

10. Action Plan: Year One

The Elgin Museum is already set up and operated with the above aims in mind; the purpose of the Action Plan is to define how to further develop and improve the service provided and to ensure its long-term future and financial viability.

The Actions are given priority categories and target completion dates in terms of financial years where appropriate. Many are classified as 'ongoing', in that they are continually kept under review, with progress assessed each year. 'Target dates' refer to our financial year, which runs from 1st January to 31st December. The Action Plan is to be reviewed annually in January/February and again in July/August.

10.1 Action Plan 2019

AIM 1: Increase user numbers							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
1a. Increase visitor numbers	Continued promotion & awareness raising of Museum through local press outlets, local organisations, postering, coach companies, hotels and B&Bs	AMPC			Ongoing		No. of visitors

	Increased promotion & awareness raising on social media and website	CH / JK			Ongoing		No. of visitors
	Investigate alternative traditional promotional options (eg. local press opportunities, advertisements eg through tourism media)	AMPC	Y?		December 2019		No. of visitors
	Investigate alternative digital promotional options (eg. GoogleAds)	CH			June 2019		No. of visitors
	Increased opening hours – Sunday opening in peak summer months	SH2			2019 / ongoing		No. of visitors
	Increased number and variety of events (and promotion of events)	AMPC			Ongoing		No. of visitors
1b. Increase volunteer numbers	Increased promotion & awareness raising of volunteer programme	JC / AMPC			Ongoing		No. of volunteers

	Improved training and support for volunteers	JC	Y		Ongoing		No. of volunteers
1c. Increase Moray Society membership	Increased promotion & awareness raising of The Moray Society	AMPC			Ongoing		No. of Society members
1d. Increase Young Marvels membership	Identification of Lead to oversee scheme	EC/AMPC			March 2019		Lead appointed
	Increased promotion & awareness raising of Young Marvels	YM Lead / AMPC			Ongoing		No. of new YM members
	Increased events & activities for Young Marvels	YM Lead / AMPC	?Y		Ongoing		No. of YM events
	Continuation of engagement with existing members, newsletters etc	YM Lead			Ongoing		i. No. of newsletters issued ii. Feedback received
1e. Increase use of building stock	Increased promotion & awareness raising of available space	AMPC			Ongoing		No. of bookings for building spaces
1f. Increase number of researchers	Increased promotion & awareness raising of collections	ALL			Ongoing		No. of researchers

1g. Increase number of group visits (school, student, local community, tourist)	Increased promotion & awareness raising of Museum to local schools, universities, community groups, heritage groups etc.	JK / AMPC			Ongoing		No. of group visits
	Investigate options to attract small tour groups (eg. From local bus and taxi tour companies)	AMPC			Ongoing		No. of group visits
AIM 2: Improve access to, and promotion of, Moray's heritage							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
2a. Increase number and variety of events & activities	Increased number and variety of events for children/families	JK / AMPC			Ongoing		i. No. of events delivered ii. Variety of events delivered iii. No. attending events

	Increased number and variety of events for mixed ages (adult focus, but suitable for families)	AMPC			Ongoing		i. No. of events delivered ii. Variety of events delivered iii. No. attending events
	Activities Committee to become more proactive (meet more regularly, more group discussion and share responsibility for delivery etc)	AMPC			Throughout 2019 / Ongoing		i. No. of meetings ii. No. of active committee members
2b. Increase Promotion	Continued promotion through tradition channels (local press, postering)	AMPC / ALL			Ongoing		No. of visitors
	Ensure all promotional material (digital and printed) meets accessibility standards and uses Museum template	ALL			Ongoing		Accessibility complaint material
	Continued promotion on social media and website	CH / JK			Ongoing		No. of visitors

	Add events section to Facebook	JK			March 2019		Events section added to Facebook
	Investigate alternative promotional options (e.g. Mailing list for events, sharing of events through Moray Heritage Connections, other)	AMPC / BD			December 2019		
	Identification of lead to oversee upload of all events to digital platforms (i.e. Moray Speyside Tourism website, ElginBID website, The List website, HAF, ARCH, other "What's On" websites)	AMPC			March 2019		i. Lead appointed ii. No. of events uploaded
2c. Taking the Museum outside	Promotion / awareness raising of option to take Museum out to local groups and schools	JK / AMPC			Ongoing		No. of outreach events
	Offer Museum events in the local area (e.g. walks, site tours)	AMPC			Ongoing		No. of outside events

2d. Increase awareness of digital collection	Increased promotion of YouTube and Sketchfab channels	CH / JK / AMPC / ALL			Ongoing		i. No. of followers ii. No. of views
	Addition of content to existing YouTube and Sketchfab channels	CH			Ongoing		i. No. of new models / videos ii. No. of followers iii. No. of views
2e. Manage and maintain social media	Increase number of social media followers	CH / JK			Ongoing		No. of followers
	Increase engagement through social media	CH / JK			Ongoing		No. of comments
	Develop Social Media strategy	CH			July 2019		Strategy developed
2f. Manage and maintain website	Continue to ensure website is updated and meets accessibility requirements	CH			Ongoing		No. of web users
	Continue to ensure website is operational and remains in Museum ownership	CH			Ongoing		No. of web users
	Increase online sales opportunities	CH / GH			December 2019		Availability of online sales

	Annual review and refresh of online content	CH			Ongoing		No. of web users
	Add social media 'buttons' to front page	CH			February 2019		'Buttons' online
AIM 3: Ensure the long-term care and display of our collections							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
3a. Accessioning backlog	Continue to address the backlog of accessioning work	HT, EMMC	Y	Limited from Acq&Cons fund	Ongoing, Review on completion of project March 2019		% of backlog addressed
	Ongoing compliance with Documentation Procedural Manual	ALL					
3b. Object care	Continued condition monitoring of objects and displays	HT			Ongoing		Condition of objects
	Continued environmental monitoring and actions	RM					

	Identify new lead for environmental monitoring	EMMC					
3c. Development of displays	Assess, review and refresh displays (permanent and temporary)	EMMC	Y		Ongoing		Recommendations for displays
3d. Museum Catalogue and database	Excel catalogue to continue to be updated	ALL			Ongoing		Catalogue updated
	Investigation of SPECTRUM compliant database options	JT	Y		November 2019		Report on database options
3e. Recognised Collection development	Completion of review and cataloguing of the geology/mineral collection	Geology Group			Ongoing / 2020		Review and cataloguing completed
	Improvements to display and interpretation of Recognised palaeontology collection	Geology Group	?Y	Recognition fund	Ongoing / 2021		i. Improved display ii. improved interpretation
	Ensure retention of Recognised	JT / Geology Group			4th February 2019		Recognised Status retained

	palaeontology Collection status						
3f. Object storage – review of existing storage	Complete reorganisation of East Store begun in 2017 (including Location & Movement Control documentation)	HT			March 2019		i. Store reorganised ii. All object documentation updated
	Complete reorganisation of North Store begun in 2018 (including Location & Movement Control documentation)	HT			March 2019		i. Store reorganised ii. All object documentation updated
	Rebuilding of North Store art storage area	RW	Y	Y	2019/20 winter		
3g. Insurance of collection	Ensure continued insurance of collection	RR			Ongoing		Collection insured
	Completion of insurance assessment/valuations	RR / HT			December 2019		No. of assessments/valuations completed
AIM 4: Secure the future of the Museum buildings							
Objective	Action	Lead person	Resources needed	Budget and	Completion date	Priority	Performance indicators

				funding source			
4a. Maintain the building stock	Complete a review of the condition of the building stock	CH/RW	Y		April 2019		Creation of review report
	Create a 10-year management plan for the building stock	CH/RW	Y		July 2019		Creation of management plan
	Complete the land registration process of Lecture Hall; safe storage of Museum deeds	DS, SR	Y		2019		Completion of registration
	Investigate funding options for building repairs	EC			Ongoing		
	Carry out annual building health checks (in line with HES and SPAB guidance)	RW			Ongoing, annually		Annual building health report
	Ensure that maintenance is carried out in a conservation appropriate manner (in line with the buildings'	RW / All			Ongoing		Building is maintained appropriately

	category A listing status) using only traditional materials and appropriately skilled contractors/craftspeople – refer to the advice following CARS for trades						
	Continue review of Museum electrical services	RW	Y		2019		Report on review
	Ensure continued insurance of building stock	RR	Y c.£5000		Ongoing		Building is insured
4b. Be aware of climate change implications	Monitor the condition of the buildings more closely, be aware of the potential negative impacts of climate change on the building stock	RW / All			Ongoing		
4c. Ensure Health & Safety and security	Ensure PAT testing is carried out annually	BD	Y		Ongoing / annually		Completed PAT test

requirements are managed							
	Ensure CCTV is operational	RW			Ongoing / annually		Operational CCTV
	Ensure Security System is operational (currently with Chubb); review as required	BD/RW	Y		Ongoing / annually		Operational Security System
	Ensure Fire System is operational (currently with Chubb); review as required	RW/PM	Y		Ongoing / annually		Operational Fire System
AIM 5: Improve long-term sustainability							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
5a. Follow, review, develop Forward Plan and Action Plan	Ensure workforce (paid and unpaid) are aware of Forward Plan and Action Plan, including individual requirements for delivery of actions	BD / JC / EMMC/ All			Ongoing / annually		

	Ensure the Action Plan is regularly reviewed and is developed annually to meet changing needs/situations	EMMC / MSB			Ongoing / annually		i. Up to date Action Plan ii. Actions being implemented
5b. Improve financial position to ensure future sustainability	Continued management of accounts by Treasurer	GR			Ongoing		
	Preparation of forward spending plans to assess funding shortfalls in advance and identify possible budget savings	GR/FC			2019		
	Investigate options to increase income (e.g. sponsorship of object/displays, individual/corporate; increased revenue through use of building space; largescale fundraising events;	AMPC/FC	?Y		Ongoing / 2020		

	crowdfunding for specific projects)						
	Continued investigation of grant-funding options by volunteer External Funding Co-ordinator	EC			Ongoing		
5c. Increase retail opportunities	Increase online sales possibilities	CH / GH			Ongoing / 2019		No. of items available to buy online
	Assessment of stock and display. Consideration of refresh of products for sale; increased number of Museum branded products for sale (standardise style to create a unique brand identity)	GH	Y		Ongoing		
5d. Sustainability of workforce resource	Continued succession planning of workforce (paid and unpaid) EMMC and Moray Society Board	All			Ongoing		

	Increased promotion of opportunities and benefits of volunteering	JC / AMPC / ALL			Ongoing		No. of volunteers
	Continued investigation into funding a new museum manager post	EC	Y		Ongoing / 2021		
	Investigation into additional funding sources for paid staff resource (to include budget for training)	EC	Y		Ongoing / 2021		
5e. Ensure sustainability of building stock	Continued maintenance and management of building stock	RW	Y		Ongoing		
5f. Emergency Plan	Ensure Emergency Plan is up to date and regularly review	SH1			Ongoing / annually		Up to date Emergency Plan
	Ensure workforce, “role players” and emergency services are aware of Emergency Plan	SH1			Ongoing / annually		

5g. Environmental sustainability	Continue with recycling programme in line with local availability	ALL			Ongoing / annually		Reduction in landfill waste
	Review of energy and lighting use, investigate options for improvements and savings	BD			Ongoing / 2019		
5h. Review of Society format	Consideration of alternative scheme name and format, improved membership offer, how to appeal to young audience, better incentives for membership	MSB			Ongoing / 2021		i. No. of Society members ii. Broadened age range of Society members
5i. Continue to be an Accredited museum	Continue to operate to accreditation standards	ALL			Ongoing / 2023		
	Ensure workforce are aware of Accreditation (meaning and requirements)	ALL / EMMC / MSB			Ongoing / annually		

	Keep up to date with MGS/ACE requirements	ALL			Ongoing		
5j. Management of funded projects	Funded projects will be in line with priorities identified through the Forward Plan and Action Plan. Projects diverting from these priorities must be approved by the Board.	ALL			Ongoing		Delivery of Museum's Action Plan
	Risk Registers and Lessons Learnt logs to be maintained throughout funded projects	ALL / Project officers			Ongoing		i. Risk Register ii. Lessons Learnt Log iii. Improved monitoring of projects
	Moray Society Board to be provided with regular updates on all funded projects	ALL / Project officers			Ongoing		MSB Updated
	End of Project reviews with lesson learnt logs to be provided to Moray Society Board on completion of all projects	ALL / Project officers			Ongoing		i. Review report ii. Increased awareness of problems/ issues/ challenges iii. improved planning for projects

AIM 6: Care for and develop our workforce							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
6a. Ensure appropriate management and development of paid staff	Increase regularity of employee review	BD / Line Managers			Ongoing / annually		No. of employee reviews
	Summary of employee reviews to be presented to Moray Society Board	BD / Line Managers			Ongoing / annually		No. of employee review summary reports
	Encourage paid staff to maintain Personal Development Plans (PDP)	BD / Line Managers / Paid staff			Ongoing		Staff have PDP
	Encourage paid staff to maintain Continuing Professional Development logs (CPD)	BD / Line Managers / Paid staff			Ongoing		Staff have CPD

6b. Ensure appropriate support for, and management of, volunteers	Make sure volunteers are aware of existing support network	JC			Ongoing		
	Improve channels for volunteer feedback and encourage openness	JC			Ongoing		Increase in volunteer feedback
6c. Assess training needs of the workforce (paid and unpaid)	Encourage workforce feedback to highlight areas where they would like training	JC / BD / ALL			Ongoing		Increase in feedback
	Identify areas where training is required from user feedback	ALL			Ongoing		Training identified
	Circulate information regarding external training opportunities as and when identified	ALL			Ongoing		
	Workforce to maintain training records	ALL			Ongoing		

6d. Identify funding sources for training	Investigate funding sources for training e.g. AIM, Recognition Fund	EC			Ongoing / 2021		Funding identified
	Consideration of creating a training budget	GR/FC			Ongoing / 2021		Budget identified
6e. Maintain standards, keep up to date	Ensure workforce (paid and unpaid) are aware of the Museum's plans and policies	BD / Line Managers / JC / ALL			Ongoing / annually		
	Ensure workforce (paid and unpaid) keep up to date with relevant policies, standards and practice	BD / Line Managers / JC / ALL			Ongoing / annually		
AIM 7: Provide an educational resource							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators

7a. Interaction with schools and colleges	Continue engagement with local schools (nursery, primary and secondary)	JK			Ongoing		
	Increase number of school visits – visit <i>to</i> Museum and visits <i>from</i> Museum	JK			Ongoing		i. No. of school visits to Museum ii. No. of Museum visits to schools
7b. Increased interaction with local groups including youth groups	Increased promotion of opportunities for groups to visit, and for Museum to visit groups	JK / AMPC			Ongoing		i. No. of group visits to Museum ii. No. of Museum visits to groups
	Increased promotion of object handling opportunities for groups visiting, and for Museum to take objects for handling to groups	JK / AMPC / Geology Group / Archaeology volunteer			Ongoing		No. of object handling events
7c. Increased research opportunities	Increased promotion & awareness raising of collections	AMPC / Geology Group / Archaeology volunteer			Ongoing		No. of research requests

	Increased interaction with universities and other museums	Geology Group / Archaeology volunteer			Ongoing		No. of research requests
	Ensure Museum receives copy of research on completion / information to update Museum records	ALL			Ongoing		No. of research papers / articles etc received
	Ensure Museum received a copy of any digital output (e.g. 3D model) of digital research.	ALL			Ongoing		No. of new models / videos
	Addition of more research information to website	CH			Ongoing		i. No. of items added ii. of web hits
7d. Educational opportunities through events and activities programme	Continuation of annual lecture programme	AMPC			Ongoing		i. No. of lectures ii. No. of people attending

	Improved marketing of lecture programme, e.g. to local college, other local heritage groups	AMPC			Ongoing		i. No. of people attending
	Continuation of biannual conference programme (delivering or hosting conferences)	AMPC			Ongoing		i. No. of conferences ii. No. of people attending
	Offering learning/training opportunities as events	AMPC			Ongoing		No. of events
	Continuation of Young Marvels activity programme	YM Lead / AMPC			Ongoing		No. of YM activities/events
<i>AIM 8: Work with other organisations with overlapping aims</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
8a. Ensure that the Museums Strategic Aims and	Keep up to date with National and Local Policy	ALL			Ongoing		

Objectives are in line with National and Local Policy							
8b. Maintain good relationship with National Museum of Scotland (NMS), Museums Galleries Scotland (MGS), and other museums	Continued communication, and continued operation in line with national standards and guidance	ALL					
	Investigation of options for loan exhibitions	EMMC	Y		Ongoing		
8c. Continue to work with and support other local heritage groups and museums	Continued membership of Moray Heritage Connections (MHC) and attendance at meetings	BD/ EMMC			Ongoing		

	Minutes from MHC meetings to be circulated in full to all EMMC members	BD / EMMC			Ongoing		
8d. Continue to work with and support the local voluntary sector	Continue to maintain good relationship with tsiMORAY and other voluntary organisations	JT			Ongoing		
8e. Continue to develop relationship with, and support the work of, Moray Speyside Tourism DMO	Continued communication with MST	JT / EMMC					
	Continued operation in line with local tourism strategic priorities	ALL					
	Continued support and promotion of Moray as a tourism destination	ALL					

	Upload of events to MST website	Digital Lead					No. of events uploaded
8f. Continue to develop relationship with, and support the work of, Visit Scotland	Continued communication with Visit Scotland	JT					
	Continued operation in line with national tourism strategic priorities	ALL					
	Updating of Elgin Museum page on Visit Scotland website	CH					
	Events and display planned in line with National Themes, alternate years	JK			2020 (Coast and Waters)		
8g. Continue to maintain existing, and develop new, relationships	Continued communication	ALL					

with Further Education Institutions (universities, colleges etc)							
	Continue to explore and develop new contacts locally, nationally and internationally	ALL					
AIM 9: Act as a focus for the receipt of objects from the Moray region							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
9a. Maintain a good relationship with the Treasure Trove (TT) unit	Continue to liaise with TT, reporting objects, applications to TT and NFA	HT/JT		Funding for TT acquisition. Internal Acq&Cons, 50% NFA	Ongoing		
9b. Maintain good relationship	Continue to liaise with detectorists, offering identification services	HT			Ongoing		

with local Metal Detectorists	and acting as a reporting channel to TT						
	Continue to offer regular finds reporting days (with TT)	HT			Ongoing		No. of finds reporting days
9c. Continue to follow, review, develop our Collections Development Policy	Ensure workforce is aware of and following policy	HT / ALL			Ongoing		
	Review and develop policy as required	EMMC			Ongoing		
<i>AIM 10: Be the best museum heritage tourism experience in Moray</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
10a. Improve consistency of customer service	Improved training opportunities for volunteers, training to be mandatory	JC / GH			Ongoing / 2019		i. Visitor feedback ii. Visitor donations ii. retention of Visit Scotland 4-star rating

	Ensure volunteers are making visitors aware of all facilities (e.g. interpretation for upstairs case being downstairs for those who can't access; toilets, baby change, fixed seating and walking stools)	JC / ALL			Ongoing / 2019		i. Visitor feedback ii. Visitor donations ii. retention of Visit Scotland 4-star rating
	Volunteers to highlight guided tour option is available to visitors	JC / ALL			Ongoing / 2019		i. Visitor feedback ii. Visitor donations ii. retention of Visit Scotland 4-star rating
10b. Increase global awareness of the Museum	Increased promotion, increased partnership working	AMPC			Ongoing		
10c. Enhanced events programme	Increase the number and variety of events and activities offered	AMPC			Ongoing		i. No. of Events ii. Variety of Events
10d. Assess the needs of users and non-users	Annual surveys of users/non-users	CH			Ongoing / annually		i. Annual survey completed ii. Responses of survey collated, circulated, fed into action plan

	Continued collation of visitor feedback	GH			Ongoing / annually		i. Feedback recorded ii. Feedback collated, circulated, fed into action plan
	Continued monitoring of online review platforms (Trip Advisor, Google)	Digital Lead			Ongoing		i. Feedback recorded ii. Feedback collated, circulated, fed into action plan
10e. Improve / enhance interpretation and signage (internal and external)	Ensure all interpretation and signage meets accessibility standards and uses Museum templates	ALL			Ongoing		
	Review and refresh interpretation	EMMC	Y		Ongoing / 2020		
	Improve external signage to Elgin Museum	SH2	Y	Y / ElginBID	2019		
	Review and refresh internal signage, ensure signage is accessibility compliant	EMMC	Y		Ongoing		
	Review existing foreign language guides and investigate new options	EMMC	Y		Ongoing		

	Investigate options for tactile interpretation, guides for visually impaired (printed or oral)	EMMC	Y		Ongoing		
10f. Improve / enhance displays	Review and update 'Modern' display in People and Places gallery (in line with visitor feedback)	EMMC			March 2019		Updated 'Modern' display
	Continue to offer fresh temporary displays in available display cases.	EMMC			Ongoing/Annually (to be agreed at 1st EMMC meeting of the year)		New temporary displays
	Consideration of relocation of Victoriana to upstairs cabinets to increase display potential for geology and archaeology (in line with visitor feedback)	EMMC			Ongoing / 2020		
10g. Continue to meet Visit Scotland visitor	Ensure consistent high standards of customer care	JC / ALL			Ongoing / Assessment 2019		Retention of Visit Scotland 4-star rating

attraction standards to at least 4 star level							
	Ensure the Museum is consistently clean and accessible	ALL			Ongoing / Assessment 2019		Retention of Visit Scotland 4-star rating
	Implementation of actions identified in previous Visit Scotland review (painting of WC, social media on website, customer service improvements)	RW/CH/JC			2019		Retention of Visit Scotland 4-star rating

10.2 Action Plan 2019 - end of year review template

A review of the 2019 Action Plan will be undertaken in July/August 2019, to assess the plan's progress and prepare for the closed season, and again in January 2020, to plan for the upcoming 2020 open season. The template below will be used for assess the aims, what progress has been made, where an action has been reprioritised and where actions need to be postponed to a future action plan. A sample is completed for explanation. The review(s) will be undertaken by the EMMC and presented to the Moray Society Board.

AIM 1: Increase user numbers			
Objective	Action	Progress	Actions to carry forward
1a. Increase visitor numbers	Continued promotion & awareness raising of Museum through local press outlets, local organisations, postering		
	Increased promotion & awareness raising on social media and website		
AIM 2: Improve access to, and promotion of, Moray's heritage			
Objective	Action	Progress	Actions to carry forward
2a. Increase number and variety of events & activities	Increased number and variety of events for children/families		

11. Provisional Action Plan 2020 – 2021

A number of actions have been identified for the periods 2020-2021, include below to form the provisional basis of future Action Plans, following review(s) of the current plan. Those aims which are ongoing are not included below but will be incorporated from the current plan during the review process.

<i>AIM 1: Increase user numbers</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
<i>AIM 2: Improve access to, and promotion of, Moray's heritage</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
2c. Taking the Museum outside	Investigate options for temporary display of items in other local locations				2020		
<i>AIM 3: Ensure the long-term care and display of our collections</i>							
Objective	Action	Lead person	Resources needed	Budget and	Completion date	Priority	Performance indicators

				funding source			
3d. Museum Catalogue and database	Object locations in Excel catalogue to be updated, and additional keyword search column(s) to be added				2020		i. No. of object locations updated ii. No. of records with keyword search terms
3e. Recognised Collection development	Improvements to display and interpretation of Recognised palaeontology collection	Geology Group			Ongoing / 2021		i. Improved display ii. improved interpretation
	Consideration of application for Recognised status for archaeology collection				2020 / 2021		
	Consideration of West Store refurbishment	JT / Geology Group			2021		Store reorganised
AIM 4: Secure the future of the Museum buildings							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators

4a. Maintain the building stock	Undertake a feasibility study and options appraisal for the building stock to assess improvement and use options				2020		Creation of feasibility study
AIM 5: Improve long-term sustainability							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
5a. Follow, review, develop Forward Plan and Action Plan	Ensure that the Forward Plan is reviewed on schedule	EMMC / MSB			July 2023		i. review report ii. new Forward Plan
5b. Improve financial position to ensure future sustainability	Investigate options to increase income (e.g. sponsorship of object/displays, individual/corporate; increased revenue through use of building				Ongoing / 2020		

	space; largescale fundraising events; crowdfunding for specific projects)						
5d. Sustainability of workforce resource	Continued investigation into funding a new museum manager post	EC			Ongoing / 2020		
	Investigation into additional funding sources for paid staff resource	EC			Ongoing / 2021		
	Investigate alternative storage solutions (on site / off site)				2021		
5e. Ensure sustainability of building stock	Investigate improvements to enhance use of building stock.				2021		No. of new building users
5h. Review of Society format	Consideration of alternative scheme name and format, improved membership offer, how to appeal to young audience, better				2020		i. No. of Society members ii. Broadened age range of Society members

	incentives for membership						
AIM 6: Care for and develop our workforce							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
6d. Identify funding sources for training	Investigate funding sources for training				2021		
	Consideration of creating a training budget				2021		Funding identified
AIM 7: Provide an educational resource							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
AIM 8: Work with other organisations with overlapping aims							
Objective							

8f. Continue to develop relationship with, and support the work of, Visit Scotland	Events and display planned in line with National Theme years				2020 (Coast and Waters) 2022 (Scotland's Stories)		
<i>AIM 9: Act as a focus for the receipt of objects from the Moray region</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
<i>AIM 10: Be the best museum heritage tourism experience in Moray</i>							
Objective	Action	Lead person	Resources needed	Budget and funding source	Completion date	Priority	Performance indicators
10e. Improve / enhance interpretation and signage	Review and refresh interpretation				Ongoing / 2020		

10f. Improve / enhance displays	Consideration of relocation of Victoriana to upstairs cabinets to increase display potential for geology and archaeology (in line with visitor feedback)				Ongoing / 2020		
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Key of People Responsible

Initial	Person	Position
AMPC	Activities, Marketing & Promotion Committee	
BD	Bill Dalgarno	EMMC Convenor, Moray Society Membership Secretary, Volunteer, Trustee, EMMC
CH	Claire Herbert	Volunteer, Trustee, Website Operator, Twitter, You Tube and Sketchfab account operator, AMPC
DS	Donna Skelly	Trustee
EC	Edna Cameron	Volunteer, External funding Coordinator, EMMC, Trustee
EMMC	Elgin Museum Management Committee	
FC	Finance Committee	
GH	Gayle Henderson	Volunteer, Retail (Shop) volunteer, Visitor Feedback Co-ordinator, EMMC, Hall hiring
GR	Graham Robertson	Moray Society Treasurer, Volunteer, Trustee, EMMC
HT	Heather Townsend	Museum Assistant (paid)
JC	Jenny Cook	Volunteer, Volunteer Mentor
JK	Jen Kelshaw	Learning & Access Officer (paid), Facebook & Instagram account operator
JT	Janet Trythall	Vice President of the Moray Society, Volunteer, Trustee, Geology Group, Archaeology Volunteer, AMPC, EMMC, Health & Safety
MSB	Moray Society Board	
PM	Peter Manson	Janitor
RM	Ritchie Mabon	Volunteer
RR	Rebecca Russell	Trustee, Insurance
RW	Rob Wallen	Volunteer, Buildings Volunteer,
SH1	Stuart Huyton	Volunteer, Emergency Plan coordinator
SH2	Stewart Halkett	Volunteer, AMPC
SR	Sarah Rennie	Museum's solicitor
YM	Young Marvels	

12. Appendices

Appendix 1 Visitor Feedback Summary 2018

The comments below reflect instances of multiple similar responses, collated from 3 sources, for consideration in formulating the Museum's forward plan and actions/priorities.

Highlights for consideration/review from onsite feedback (visitor book/notice board) 2014-2018

display info	upstairs folders - pictures and descriptions need to be side by side.	find taking out folders a bit distracting, understand the reason for folders but would like a brief description card for each item	catalogues hard to locate	Preference for artefact notes to be on a chart rather than in a folder.	upstairs have descriptions but downstairs doesn't.	Improvements - more information about items		
lighting	lights in some cases quite dim	Please put better lighting on Dandaleith Stone to make carvings more visible						
displays/ exhibitions - women	pity nothing about Women's Services during WW2	more stories of Women of Moray	more about women and their struggles through history e.g. fight for the vote					

displays/ exhibitions - wildlife	request for us to stop killing and stuffing animals (if it's us who are doing it) as it's cruel!	Warnings for "creepy stuffed creatures" on message board	DISPLAYS more wildlife / wildcats / stuffed animals requested (second highest in feedback after more dinosaurs)					
Mummy	Mummy - return her	Mummy is scary / feel sorry for her						
displays/ exhibitions - more/ new	romans	More dinosaurs / fossils / geology (more info, big models, bones, worksheets etc.)	Vikings	weaponry	science	Picts	update 'Modern' display	

Highlights for consideration/review from online survey 2018

GENERAL	LOCATION (VISITORS WOULD LIKE MUSEUM TO BE NEARER	TRANSPORTATION ACCESS						
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	WHERE THEY LIVE)							
PROMOTION	PROMOTION - FACEBOOK	EMAIL EVENTS LISTING	PROMOTION OF ACCESS TO OBJECTS FOR RESEARCH ETC	BETTER USE OF FACEBOOK TO PROMOTE EVENTS				
EVENTS + MORE EXHIBITS:	PICTS	ROMANS	MORE GEOLOGY	NATURAL HISTORY	OBJECTS FROM OTHER MUSEUMS (E.G. NMS)	LOAN EXHIBITS FROM PRIVATE COLLECTIONS		
DISPLAYS	REVAMP ARCHAEOLOGY	MODERNISE DISPLAYS (A FEW OF THIS)	REFRESH DISPLAYS	BETTER LIGHTING	CHANGE NATURAL HISTORY DIORAMA TO STONE AGE MAN	BETTER LIGHTING AT BACK, DARK AROUND DIORAMA	LESS NATURAL HISTORY	
BUILDING	LIFT	COMFY SEATS	AUDIO GUIDES	SEATS	INFO DOWNSTAIRS ON UPSTAIRS DISPLAYS	BETTER SIGNAGE	VIDEOS INSIDE MUSEUM	BETTER LIGHTING

FRONT DESK/VOL S	GUIDED TOURS	FRONT DESK - SMARTER APPEARANCE	FRONT DESK - MORE TIME IN GALLERY AREA LESS TIME "CHATTIN G" AT FRONT	FRONT DESK - VARIETY OF SERVICE, SHOULD BE MORE CONSISTE NT				
DIGITAL	COLLECTION S ONLINE	YOUTUBE VIDEOS OF COLLECTIONS						

Google 41 REVIEWS // AVERAGE SCORE OF 4.8 / 5

Trip Advisor 90 REVIEWS // SCORED AS #6 OF 24 THINGS TO DO IN ELGIN // TRAVELLER OVERVIEW AVERAGE OF 4.5

Some comments received online:

Small but packed with interesting things and information. Free entry ... donate if you enjoyed the visit.

Fantastic array of exhibits and ever such friendly staff, can recommend

This is a great museum, free entry (by donation) and the wonderful staff were quick to give an introduction of the museum.

Brilliant museum. Staff friendly and very helpful and knowledgeable. Don't miss it ! Free admission but worth a fiver of anyone's money

Elgin museum is one of few where you can visit more than once knowing that you'll keep learning something new. It has a generous voluntary entrance fee system where I imagine most visitors pay a few pounds with pleasure and the displays are user-friendly and attention-grabbing. To keep 2 teenagers occupied for over an hour, you must be doing something right.

Appendix 2 Overview of National and Local Tourism Strategies

Scottish Government Tourism Scotland 2020

The national tourism strategy, Tourism Scotland 2020 (TS2020), was developed by the Scottish Tourism Alliance (STA) with the support of the Scottish Government.

It aims to make Scotland a "first-choice destination for a high quality, value for money and memorable customer experience delivered by skilled and passionate people".

Four main priorities were identified under the mid-term review of TS2020:

- digital tourism
- leadership
- quality of customer experience
- investment in infrastructure

Visit Scotland's Tourism Development Framework

The Framework has been prepared to support the aim of increasing sustainable economic growth in the visitor economy being promoted by the planning system at the national level – Scottish Planning Policy and the National Planning Framework – and help development planning authorities (including strategic development planning authorities, local planning authorities and national park authorities) to develop their own strategies to grow the visitor economy in their local areas.

The aims are identified under two headings, divided by theme:

IMPROVING THE CUSTOMER JOURNEY

Theme 1 - Digital

Theme 2 - Transport

Theme 3 - Accommodation

Theme 4 - Food & Drink

PROVIDING AUTHENTIC EXPERIENCES

Theme 5 – Nature & Activities

Theme 6 – Heritage & Culture

Theme 7 – Destinations, Towns & Cities

Theme 8 - Business Events

Theme 9 - Events & Festivals

This is underpinned by the Sustainable Tourism Policy, which recognises that a sustainable approach to tourism growth is the only way to ensure long-term success of tourism in Scotland.

Sustainable Tourism is to be developed and delivered under the following headings:

- Greener Transport - Transport is central to tourism, but it also puts pressure on our natural resources and makes a contribution to our global environmental impact. Measures like encouraging visitors to use public transport, and innovations in cleaner forms of transport will help in this area
- Greener businesses - All businesses work towards being more sustainable, taking a range of actions to reduce their resource use, support their local communities and enhance their customer experience
- Inclusive Tourism - Inclusive Tourism aims to create products and experiences where everyone feels welcome and included. Examples of some customers who typically benefit from inclusive tourism are customers, such as:
 - people with hearing loss
 - visual or mental impairment
 - wheelchair users or older people
 - families with young children
- Even Visitor Distribution - A more even spread of visitors reduces pressure on natural and built environments and on communities, and maximises the economic benefits across Scotland. We encourage a spread of visitors throughout the year and around the country through a range of activities
- Understanding the Impacts - We work with partners to measure the environmental and social impacts of tourism so we can ensure that tourism development brings a positive experience for local people, tourism companies and visitors themselves while protecting the environment we all rely on

The Strategy for Tourism Development in Moray

“In 2025, Moray will be known nationally and internationally as an exceptionally attractive destination for leisure and business visitors, offering memorable experiences, based on the area’s unique assets, including malt whisky, the heritage of Macbeth, its pure natural environment and superb food using local produce”

The strategy has been developed to help achieve this vision. It aims to maximise the economic, social and cultural benefits of tourism to Moray and spread the benefits across all sectors of the community.

The objectives of the Strategy are:

- To double the economic value of tourism
- To double the size of the tourism-related workforce, with at least 80% working all-year round, living locally and fully skilled for their job and trained in customer care
- To achieve annual occupancy of serviced accommodation rooms of at least 75%; and at least 65% occupancy of self-catering units

Moray Cultural Strategy 2014 – 2017 (note: no new strategy has been produced to date)

The vision of the Strategy is for Moray to be recognised as a place where:

- Creative activities benefit health and wellbeing.
- Cultural experiences are accessible in every community.
- Visitors encounter a dynamic and authentic cultural offer.
- Creative people and creative businesses thrive.

To achieve this vision and strengthen the values that underpin it, the following eight objectives have been identified.

- 01 Recognise the positive impact of creativity for everyone.
- 02 Encourage new ways to encounter creativity in the everyday.
- 03 Empower communities to establish sustainable cultural activities.
- 04 Develop tools to connect and communicate about cultural activity.
- 05 Grow quality cultural activities, festivals and events.
- 06 Make effective use of our built environment and natural heritage.
- 07 Ensure access to creative learning for all who seek it.
- 08 Help creative businesses to start, grow and develop.

Appendix 3 Overview of National Strategic Aims

Museums Galleries Scotland National Strategy Aims

AIM 1 Maximise the potential of collections and culture

AIM 2 Strengthen connections between museums, people and places to inspire greater public participation, learning and well-being

AIM 3 Empower a diverse workforce to increase their potential for the benefit of the sector and beyond

AIM 4 Forge a sustainable future for sector organisations and encourage a culture of enterprise

AIM 5 Foster a culture of collaboration, innovation and ambition

AIM 6 Develop a global perspective using Scotland's collections and culture

Scottish Government National Outcomes

1. We live in a Scotland that is the most attractive place for doing business in Europe.
2. We realise our full economic potential with more and better employment opportunities for our people.
3. We are better educated, more skilled and more successful, renowned for our research and innovation.
4. Our young people are successful learners, confident individuals, effective contributors and responsible citizens.
5. Our children have the best start in life and are ready to succeed.
6. We live longer, healthier lives.
7. We have tackled the significant inequalities in Scottish society.
8. We have improved the life chances for children, young people and families at risk.
9. We live our lives safe from crime, disorder and danger.
10. We live in well-designed, sustainable places where we are able to access the amenities and services we need.
11. We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others.
12. We value and enjoy our built and natural environment and protect it and enhance it for future generations.
13. We take pride in a strong, fair and inclusive national identity.
14. We reduce the local and global environmental impact of our consumption and production.
15. Our people are able to maintain their independence as they get older and are able to access appropriate support when they need it.
16. Our public services are high quality, continually improving, efficient and responsive to local people's needs.