

# COMBE MILL SOCIETY



## **BUSINESS PLAN (FORWARD PLAN)**

Combe Mill Society  
Blenheim Palace Sawmill  
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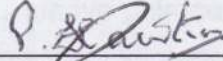

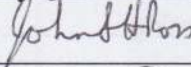
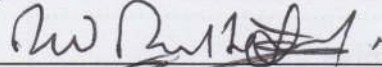
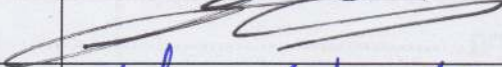
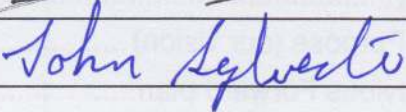
## Definitions

- 1 *Strategic Plan*:- an overarching plan with a time scale of three to five years. To be reviewed every 12 months and rolled forward by 12 months.
- 2 *Key Aims*:- aspirations for achievement during the timescale of the Strategic plan.
- 3 *Operational Plan*:- a plan of action, within the context of the Strategic Plan, but with a time scale of 12 months. To be reviewed every three months and rolled forward by three months.
- 4 *Objectives*:- Matters which are to be achieved within the timescale of the Operational plan.

## Register

Issue	Date	Reason for change	Appr	
1.0	03/11/06	Development	Board	
2.0	01/04/08	Updated to reflect developments	Board	
3.0	09/09/09	Revised	-	
4.0	21/05/13	Re-written following conservation and improvements project	-	
5.0	25/06/14	Revisited for meeting of trustees	-	
6.0	30/10/14	Re-drafted for review with MDO prior to trustee approval	-	
7.0	15/01/15	Issue for Trustee/Board approval		

### Approvals

Name of Director	Signature of Director	Issue Approved
Alan Elger		
Philip Hawtin		
Steve Page		
John Ross		
Ron Rutherford		
Tony Simmons		
John Sylvester		

This Business Plan will, as far as reasonably practicable, be reviewed every three months or whenever there is a significant change in the environment in which the Society operates.

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## **1. Summary**

This Business Plan is the culmination of much deliberation about the future of Combe Mill and what needs to be achieved to secure a sustainable future for its operation. The plan will be used as the basis of a revitalization project for which funding will be sought from the Heritage Transition Fund.

## **2. About our Organization**

### ***2.1. The Mill***

Combe Mill is a sawmill belonging to the Blenheim Estate of the Duke of Marlborough having been on this site since Saxon times; the Domesday survey of 1086 refers to a mill at 'Cube', which is known to be Combe. It is reasonable to assume that the mill had existed for some time before that. Originally the village of Combe was also in the valley, east of the mill, but was deserted in the fourteenth century, possibly as a result of the Black Death, and now stands at the top of the hill about a mile from the mill, around the fourteenth century church. The present sawmill dates from the mid-nineteenth century and was originally powered by a water wheel and a beam engine, both of which survive, both having been restored to working order. The building and its contents are Grade II\* listed.

The beam engine bears the date 1852, but it has been suggested that blocked windows on the east side of the building indicate avoidance of window tax, thus dating the building prior to 1851. At the same time as the engine was installed a new breast-shot water wheel was fitted at the opposite end on the existing wooden shaft remaining from an earlier wheel. The mill machinery, including the forge blower and the whetstone on the ground floor and a band saw and lathes in the upper workshop, was driven via flat belts from pulleys on the line shafting, which could now be turned by either water or the beam engine. The two sources of power allowed work to continue regardless of the state of the adjacent river, and the increased reliability meant that other processes could also be undertaken.

### ***2.2. Governance***

Combe Mill Society was formed in the 1970s to conserve and operate Combe Mill as a working industrial museum.

The main emphasis of the Society is to interpret the historic and technical aspects of the old sawmill, together with the activities that were once carried out in Combe Yard in support of the Blenheim Estate. The provision of opportunities for the community to learn and interact with the social history and engineering collections is at the heart of making Combe Mill a well-regarded hands-on museum.

The Society is entirely a volunteer organization; there are no paid employees. The Society is managed by a Board of Directors whose members are also Trustees of the Society. Currently there are approximately 100 paid-up members.

Society members are drawn from various craft, trade and professional backgrounds and largely share the enjoyment of working with machinery. More members are needed with an interest in managing the Mill and dealing with marketing, fundraising and the commercial aspects that are needed to secure its long-term viability.

The Society is a registered charity (#111029) and a company limited by guarantee (#03784507). A minimum of six and a maximum of ten trustees are defined in our Articles of Association. Trustees are also directors.

### ***2.3. Opening hours and steaming events***

There are currently three different types of 'opening' for our visitors.

- a) **non-steaming open days** on Wed/Sun, 10.30am – 4.30pm, April to mid-Oct.
- b) **eight steaming events** on the third Sunday of each month (Mar-Oct) with themes and special attractions
- c) **community group and educational visits**, booked in advance with flexible timings (Mar-Oct), sometimes with "steaming"

On the steaming Sundays, enthusiasts are encouraged to bring their own steam and other engines and have them in operation. In addition on these Sundays there are often special displays of country crafts Morris dancing etc.

### ***2.4. Interpretation and community involvement***

The Combe Mill Society received an award from the Heritage Lottery Fund of £768,000 in 2011 to:

- undertake repairs to the historic fabric of the Mill
- enable access to all levels
- reinterpret the contents of the Mill
- develop the learning offer through volunteers with the provision of school and family learning activities and making learning resources available online
- undertake active learning and outreach events, such as a schools intergenerational project, and sessions for adult learners
- recruit new volunteers

After a nine month closure to undertake the works, the Museum reopened to the public in August 2012.

Unlike many museums we encourage our visitors to take a hands-on approach to understanding how machinery works and how hand tools were used by craftsmen. On open days our volunteer blacksmiths guide visitors to make simple metal objects such as pokers and toasting forks. They can also make wooden handles for these under the guidance of our wood turners.

## ***2.5. Vision for Learning***

“We will strive to recognise and realise the full potential of the objects, archives, expertise, knowledge and other resources within the Combe Mill site to create effective and inclusive learning opportunities for, and in partnership with, local communities, the people of West Oxfordshire and the wider region”.

The site contains a range of working machinery that would be found in an estate yard of the late 19<sup>th</sup> and early 20<sup>th</sup> Century, a range of documents and images that provide insight into the social history of the local area and oral histories of some of the last workers in the site.

## ***2.6. Our Commitment to Learning***

The Combe Mill Society’s learning policy and strategy together with the above vision for learning recognises education as a primary function of our historical sites, archives and collections.

Through its collections, site, information sources and expertise, Combe Mill Society possesses a unique and high quality resource that has significant potential to provide meaningful learning opportunities. The strength of this potential lies in the capacity to impact on a wide variety of individuals on many different levels.

Combe Mill will make a difference to people in the following ways:

## ***2.7. Learning***

- More people learn about the significance of the Combe Mill heritage e.g. visitors, group travel, schools, local communities, what it means to them and their sense of place/identity.
- More schools and educational organisations will engage with the Combe Mill heritage through the provision of learning resources which are based on the requirements of the National Curriculum, exam syllabuses and programmes of study e.g. Science, Mathematics, History, Literature, Art and Citizenship.

## 2.8. Visitor number trends

Financial Year	No steaming events/ open days	Steaming Event Visitors	Open Day Visitors	Group + School Visitors	Total visitors	Website visitors
2009/10	6/0	1867	0	109	<b>1976</b>	8,733
2010/11	8/53	1870	255	70	<b>2195</b>	10,459
2011/12*	7/53	1660	437	74	<b>2171</b>	12,947
2012/13**	4/27	1394	229	207	<b>1899</b>	13,989
2013/14	8/53	1782	576	343	<b>2701</b>	14,479
2014/15^	8/46	1471^	450	333^	<b>2254^</b>	11079^

Note\* Closed for project work in March 2012

Note\*\* Closed Apr-June and figures only up until 31Oct2012

Note^ Figures up to 27 October 2014

## 2.9. Marketing

The Museum is marketed through its website, a museum leaflet, through local and national media, permanent brown tourist signs on local roads and special road signage for steaming events and open days.

Our events are also publicised in *Old Glory* and *Vintage Spirit* monthly magazines

## 3. Statement of Purpose (our vision)

- (a) to enhance the education of the public by the operation of Combe Mill at Combe, Witney, Oxfordshire;
- (b) to demonstrate, record, preserve, practise and disseminate the whole range of skills in the construction, maintenance, operation and associated activities of water and steam-powered mills, along with other items directly associated with Combe Mill, the Blenheim Estate and Oxfordshire;
- (c) to research, establish, restore, maintain and equip Combe Mill to demonstrate, improve and teach the design, construction, operation and use of water and steam-powered mills in order to educate the public, together with the dissemination of the results of any research conducted;
- (d) to carry out works for the improvement, development and promotion of Combe Mill.



#### **4. Review of Previous Forward plan**

This is the first fully constructed Forward Plan (i.e. Business Plan) of the Combe Mill Society since receiving a substantial Heritage Lottery Fund grant in 2011.

#### **5. The Environment in which we operate**

##### ***5.1. Unique Selling Point***

Combe Mill is unique because it is a rare surviving example of a working steam and water powered Mill. The mill's other attractions are that:

- its contents provide a rare chance for the public to see industrial heritage in the South of England,
- it is unspoilt by over-preservation and provides the public with hands-on experience,
- its working environment and high ratio of guides to visitors provides a memorable experience for the public,
- it is a unique example of a combined use of sustainable energy resources of steam and of water power.

##### ***5.2. Strategic Environment***

This section examines the strategic environment that Combe Mill operates within and the aims and objectives of other organisations that it supports. The Mill is situated within the Blenheim Estate, is located within the Parish of Combe which is part of West Oxfordshire District Council, within Oxfordshire County Council.

Combe Mill is well networked into the profession through the Oxfordshire Museums Council, the Association of Independent Museums and through partnerships with local schools and universities, specific museums for projects.

##### **Local and regional environment**

###### **Blenheim Estate**

Blenheim Palace and its Park and Gardens are a World Heritage Site. The Blenheim Estate recently won a silver award from the Green Tourism Business Scheme. Their Environmental and Social Policy commits them to working in a sustainable way, including reducing pollution, emissions and waste, reducing the use of energy, water and other resources, training employees in sustainable business practice and liaising with the local community.

The Blenheim Estate is Combe Mill's landlord and their environmental and social policies affect the operation of the Mill. There is already a close working relationship through the delivery of joint learning projects.

#### West Oxfordshire District Council (WODC)

WODC's *Shaping Futures - Sustainable Community Strategy* has ten priorities of which the most relevant is *The Community and the Economy*, which talks not only about the importance of local tourism to the economy, but also encouraging more people to volunteer to help people into work and to enjoy their leisure time. The Strategy places particular emphasis on young people gaining work experience through work placements and on job training and participating in their communities through volunteer schemes.

Combe Mill is a significant ingredient in the mix of the West Oxfordshire tourist offer, with over 2,000 visits to the Mill per annum. The Council's *Tourism Strategy (2009 – 2012)* aims to co-ordinate tourism partners, market the Oxfordshire Cotswolds, provide information for tourists, provide a quality experience, support environmentally sustainable tourism, provide business support, undertake market research and identify future opportunities. Combe Mill already receives an annual Community Activities Grant for specific activity led projects from WODC, but the Council's emphasis on volunteering and young people may offer further opportunities for joint projects and grant aid for activities. WODC also provided a Community Facilities Grant towards the HLF funded conservation and improvements project.

#### Oxfordshire County Council

*Oxfordshire 2030*, is the County Council's overarching strategic plan for development of the County's economy, promoting healthy communities, tackling the challenge of climate change and reducing inequalities and deprivation. Like West Oxfordshire, they also have priorities around tourism, young people and volunteering, and they also see community participation in culture and sport, as important to the way in which people experience and perceive the place where they live – contributing to a distinctive identity, engendering pride and a sense of belonging. Again, Combe Mill fits well within these priorities and the County may offer opportunities for partnerships and joint projects.

#### National environment

##### Arts Council of England

Arts Council England is the lead body charged with developing the arts in England. As of 1 October 2011, it added museum and libraries development and programmes to its remit.

The mission of the Arts Council is *achieving great art for everyone*. They have three strategic plans and the one that deals with their new responsibilities for museums and libraries is called *Culture, knowledge and understanding: great museums and libraries for everyone*

In that plan they describe five strategic goals for libraries and museums, namely:

Goal 1: Excellence is thriving and celebrated in museums and libraries

Goal 2: More people experience and are inspired by museums and libraries

Goal 3: Museums and libraries are sustainable, resilient and innovative

Goal 4: The leadership and workforce in museums and libraries are diverse and highly skilled.

Goal 5: Every child and young person has the opportunity to experience the richness of museums and libraries.

The Arts Council's goals are important to Combe Mill because ACE administers the Accreditation Scheme (which the Mill is applying for) and delivery of their goals are critical to the success of any application and achieving their standard is the 'kite mark' of a quality heritage offer.

### **5.3. The Market**

Current situation

The Activity Plan, written in 2011 in support of the Round 2 Heritage Lottery funded application, undertook a range of consultation with visitors (to open days in summer and October 2010); societies and special interest groups (visiting as part of a group tour in 2009 -10); local visiting and non-visiting families; potential partners; local heritage groups; local museum professionals; local schools.

They concluded that the existing 2,000 visitors per annum could be broken down as:

**Local people** (estimated to be between 60% and 70% of visitors) including:

- living locally in Combe and neighbouring villages
- living within Oxfordshire
- repeat visitors
- existing volunteers (living in 10 mile radius)
- Friends of Combe Mill Society

**Visitors from further away** including:

- open Day visitors from outside Oxfordshire
- open Day visitors from overseas
- people staying with local friends
- people coming with Friends of Combe Mill

**Special interest groups** including:

- exhibitors/demonstrators at Open Days
- Oxford Bus Museum visitors
- steam/engineering enthusiasts

- local business visitors such as Timber Windows
- people interested in industrial heritage
- local schools and education groups

**Local societies and groups** who visit on a trip out, including:

- WI, U3A
- cubs, scouts, guides.

Local market

There are about 31,000 people living in the towns and villages surrounding Combe Mill, excluding Witney, which is 15 minutes' drive and has a population of nearly 23,000 people and Oxford, which is 25 minutes' drive, and a population of 151,900. The immediate locality is a prime target audience for Combe Mill and for repeat visitors and exit surveys undertaken in 2009 showed that road signage was an important factor in local awareness, as was the local television and newspapers and the web site "Witney TV". Combe Mill will continue to target these very local audiences through these channels.

Day visitors and tourists

The Activity Planners commissioned an Area Profile Report from the Arts Council England, to give a general overview of the population from within a one and half hour drive time from the Mill.

This showed that there were a high percentage of affluent and well-educated people, including families, within a reasonable drive time. 13.6% are categorised as Wealthy Executives; 18.6% are Secure Families; 8.6% are Flourishing families; 3.5% are Prosperous Professionals – all well above the national average for those groups. That said, just over 9% are classified as Struggling Families. There is above average national attendance at arts events and heritage/museum sites and above the national average households with two or more cars or vans. Readership of a quality daily paper is above the national average as is that of regional morning news.

The findings highlighted opportunities to market the Mill locally and to larger towns and areas on the main routes around and out of Oxfordshire, such as Swindon, Reading, Gloucester, Worcester and Milton Keynes, particularly for open days. We intend to use free local media in these new areas and partner with heritage sites located in those target towns, such as the steam museums in Didcot and Swindon, Museum of English Rural Life in Reading and the Milton Keynes Museum.

Projected visitor numbers

The Museum reopened after refurbishment in August 2012 and in the following 5-year period following, it is planned to increase the number of

visitors, as a minimum, to 4,350 – the breakdown of this forecast is shown in the table below.

Type of activity	Number of Open Days or group tours in 2017	Target number of visitors in 2017
Open Days	55	55 x 20 = 1100
Steaming Events	8	8 x 350 = 2800
Guided Tours and education visits	18 ( 2 per month)	18 x 25 = 450
Total		4,350

Combe Mill has adopted four main target audiences, based on the National Trust's visitor segmentation approach, which focuses on visitor interests and attitudes. This approach (attitudinal segmentation) groups visitor types according to their attitude to taking a day out.

The main future audiences for Combe Mill are:

**1. Curious Minds, including:**

- adults seriously interested in industrial or Victorian heritage, often mature and/or retired and including local residents
- specialist interest groups with a national scope e.g. Steam Societies
- schools with National Curriculum focus
- professional or specialist interest e.g. local industrial historians or engineers
- independent students, including those engaged in adult education
- new and existing volunteers
- Open Day exhibitors
- some Open Day visitors

**2. Explorer Families, including:**

- local families with young children
- families from further away on a day trip to Oxfordshire

**3. Home and Family, including:**

- local societies without a special interest who are seeking passive enjoyment of an experience.
- general Open Day visitors who were 'just passing' or 'wanted to find out what was on the site'.
- associated groups such as Friends of Blenheim Palace.

#### **4. Young Experience Seekers**

- organisations such as the Scouts or corporate groups who are seeking new challenges, in a physical or horizon-broadening sense.

#### **5.4. Current and Potential Market Opportunities**

- (a) Nowhere in this part of England is there a similar working industrial heritage site. We appeal to many different interest groups and not merely steam buffs.
- (b) Some young visitors having an interest in blacksmith work have travelled from far away to try their hand in the working forge. Some have gone on to formally train in this craft.
- (c) For steam enthusiasts Didcot Railway centre is about ten miles away, but we have not identified any negative affect on visitor numbers from its existence.
- (d) In the immediate area we actually benefit from being close to, and associated with, Blenheim Palace and often visitors will combine a day out in the area to also visit the Long Hanborough Bus Museum. In the past we have sold joint tickets in conjunction with the Bus Museum and visitors were transported to the mill by vintage coach. We hope to rebuild this relationship in the future.
- (e) The Hook Norton Brewery, with its working steam engine, is some miles to the north but does not pose any perceived threat.
- (f) Cogges Manor, at Witney, once offered visitors and schools a glimpse of what agricultural life was like at about the time Combe Mill was at its working peak. Since its rebranding as a centre for food we are unaware of any threat this poses to our visitor numbers.
- (g) Although Gift Aid was introduced some time ago the funds generated have, so far, been modest. It is recognised that this potential market could be considerably enhanced and the development and use of a computerised ticketing system in-house during 2012 has resulted in a large increase in annual pass ticket sales.
- (h) The Combe Mill web site experiences many "hits" but direct marketing using e-mail, text and smart phone/tablet Apps also needs to be explored to enlarge our market penetration.

### 5.5. Constraints

- (a) Combe Mill is leased from Blenheim Estates and is located within Combe Yard which is an office/light industrial estate. The landlord is keen to limit disturbance to other tenants. Our lease currently limits the Society to hold no more than eight steaming events in any one year. We regard non-steaming open days as not such an activity but recognise that the growth in visitor numbers on such days could be constrained by limited car parking.
- (b) On steaming event Sundays, the mill comfortably accommodates about 350 visitors throughout our usual seven hour opening period (10.00hrs-17.00 hrs). We have adequate parking on these days for about half that number of visitors' cars which is adequate.
- (c) For pre-booked parties of visitors on non-steaming days we encourage them to arrive by minibus because only five parking spaces are available to mill visitors during normal office hours.

## 6. SWOT and PESTLE Analysis

The SWOT and PESTLE analysis draw together and marshal the information about current activity and operating environment and form the foundation for our aims and objectives.

### 6.1. SWOT analysis of current performance

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Commitment, enthusiasm and knowledge of volunteers</li> <li>• Enthusiasm for both technical and social matters</li> <li>• The range of experience and skills we have between us</li> <li>• The HLF project heralds a fresh start for the Mill</li> <li>• Authenticity</li> <li>• We offer a hands on experience for visitors</li> <li>• We offer a personalised visit</li> <li>• We have an amateurish period feel, which visitors like</li> <li>• We offer variety – there is something for everyone</li> <li>• Financial stability</li> <li>• We are a mature organisation</li> <li>• We have a presence in the leisure market</li> <li>• We are on the map for fundraisers</li> </ul>	<ul style="list-style-type: none"> <li>• Our members are getting older and less agile – the problem of succession</li> <li>• The skills amongst our members need to be passed down (but there are logistical problems attached to passing skills on)</li> <li>• Our volunteers, although a strength, have different motivations to volunteer and different abilities and sometimes lack focus</li> <li>• Managing a volunteer force is different to paid employees – you can't necessarily get people to commit their time</li> <li>• We lack people wanting to take on the back office jobs</li> <li>• We lack people having an education background</li> <li>• Manpower – rotas can be difficult to put together</li> </ul>

<p>(the HLF success has given us a 'kite' mark).</p>	<ul style="list-style-type: none"> <li>• We are very dependent on admissions income</li> <li>• We lack space, storage and seating</li> </ul>
<p><b>Opportunities</b></p> <p>The improvements we make through the HLF project enables us to seize the opportunity to:</p> <ul style="list-style-type: none"> <li>• open to the public on more days</li> <li>• increase the dwell time</li> <li>• increase the number of people visiting</li> <li>• broaden the range and age of people visiting</li> <li>• extend the reach of Combe Mill to an hour and a half's drive time</li> <li>• contribute to young people's personal statements</li> <li>• attract funding for skills training</li> <li>• develop our learning and outreach programmes</li> <li>• work in partnership with others to achieve our aims</li> <li>• improve our website</li> <li>• improve our marketing and communications</li> <li>• improve our signage</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Enthusiasm can outstrip capacity</li> <li>• The cost of running the Mill and maintenance will increase with the new improvements</li> <li>• The age profile of people visiting – we need to appeal to younger people.</li> <li>• Capacity to grow volunteer workforce and obtain commitment</li> <li>• Lack of public transport may hinder volunteer recruitment.</li> </ul>

## 6.2. PESTLE Analysis

<p><b>Political</b></p> <p>Change of Government in 2010 and evolving priorities around culture, audiences and learning</p> <p>The current review of the National Curriculum by the Government means that it is difficult to develop new links to subjects</p>	<p><b>Economic</b></p> <p>Economic crisis will impact upon income streams</p> <p>Price of petrol is rising and the site is wholly dependent on private transport</p> <p>Cost of coach transport for schools</p> <p>Funding across the key partner sectors, such as local authorities has been cut</p>
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	<p>and looks set to get worse</p> <p>Loss of and/or increased competition for key funding sources regionally and nationally</p> <p>Changes to the curriculum will mean the current resources might have to be rewritten and education volunteers retrained when the new curriculum becomes statutory, incurring costs</p>
<p><b>Social</b></p> <p>People have limited leisure time and there is increased competition for that time</p> <p>There is diversity of family models that the Mill needs to be aware of when thinking through provision for this target area</p> <p>Volunteering and the 'Big Society' is high on the Government agenda and could be beneficial to Combe Mill</p> <p>Some young people are beginning to feel exploited by volunteering and may expect payment</p>	<p><b>Technological</b></p> <p>The continual rise of ICT skills, and social networking sites provides new audience access, learning and interpretation opportunities</p> <p>The continual rise of mobile phone ownership means that information can be delivered through this medium</p> <p>The move is towards personalised technology and experiences</p> <p>For young people IT is the norm, not something new</p> <p>Some older people may not be wholly comfortable with latest technology, but it is dangerous to generalise</p> <p>The on-going development of e-learning will play an increasingly significant role in educational development and distance learning provision</p>
<p><b>Legal</b></p> <p>The Disability Discrimination Act 1995 and the Race Relations Act require that all people, regardless of their background be treated equally, and have the same access to services</p> <p>The Data Protection Act of 1998 must be followed on all data collection activity</p> <p>The need for all adults accompanying pupils on school visits, and all volunteers working with children for relevant periods, to be checked by the Disclosure</p>	<p><b>Environmental</b></p> <p>Apart from the legal obligation to comply with the Environmental Protection Act 1990 and the Environment Act 1995, there is strong and increasing public support for organisations that actively support and demonstrate environmental and business ethics and sustainability - there are strong 'green' messages to be delivered on site</p>

and Barring Service (DBS)	
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## 7. Key Aims

The key aims of the Society are listed in Table 1 below. The key aims are reviewed every three years.

## 8. Specific Objectives beneath each Key Aim

The specific objectives are listed beneath each key aim and form the Operational Plan, which is reviewed annually - see Table 2. This Table also gives the actions to be taken, the performance measure, who will take the action, and by when.

<p>Table 1</p> <h2 style="margin: 0;">Key Aims</h2>
<p>Title: Strategic (Key) Aims 2014 to 2018</p>

No.	Aims	Performance measure
1	Annually deliver eight steaming events and up to two school/group visits each month	Positive feedback from visitors/attendees and generate a surplus from delivering the events Attract an average of 10 visitors per day for non-steaming Open Days
2	Improve income generation	Achieve by 2018 an increase in funds from entrance fees, retail, room hire, private giving, grants and Gift Aid of £7,000 Increase income from admissions and tea room hire by at least 25% in the first year
3	Effective marketing and promotion of Combe Mill	Achieve and increase in visitors of 1,500 through enhanced, targeted, marketing and greater publicity. Prepare a Marketing Plan to this end.
4	Develop the organisation structure and strengthen the board. Develop membership management, widen volunteer base, and provide training	Achieve an increase of 30 in active volunteers, competencies assessed, training programme operated. Working Parties established for projects within key areas of operation:- (1) engineering (operation & maintenance); (2) sales & marketing; (3) volunteer management; (4) competencies & training; (5) events (front of house); (6) education An effective organisational structure in place, acceptable to members and based on a working party model.
5	Obtain museum accreditation by Arts Council	Arts Council museum accreditation registration made by 4Q2014 Full accreditation by end 2016.
6	Develop a partnerships with local organisations and provide CPD training for teachers	Partnerships with at least two local organisations in place and others being developed and CPD training being delivered.
7	Provide a greater learning experience for our visitors	90% satisfaction levels through our annual survey and feedback from schools and more activities on non-steaming days.
8	Conserve and maintain the Mill and its contents and create and operate a maintenance Management Plan and Operations Plan	Maintenance Management Plan and Operations Plan in use and effective.

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference: OP01</b> <b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No.1:</b> - Deliver events each year	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Deliver eight Steaming Events each year. (max allowed under terms of our lease)	Plan ahead to offer a varied range of themes to attract repeat visitors.	Visitor numbers of at least 250 per event Increasing numbers of returning visitors.	The Board
2. Open the Mill for viewing at least twice a week between April and September.	Train volunteers to act as stewards and to volunteer to enough duty slots to cover the program Encourage stewards to interact with visitors.	No gaps in stewarding roster No volunteer having to undertake more than four full sessions each year Good visitor feedback Number of open day visitors increased to 600 each year	The Board
3. Host a maximum of two school/group visits each month between March and November – nine months season. Target KS2 and KS3.	Continuously match our deliverable learning modules to the needs of school and key stage syllabus requirements.	Positive feedback from teachers based on written feedback Maintain two visits per month for nine months each year.	The Board
4. Expand the learning deliverables to attract KS3 and KS4 secondary age groups.	Develop learning module content Promote to secondary schools.	Attract secondary school visits and get positive feedback.	The Board

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference: OP02</b> <b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No.2:</b> - <i>Improve Income Generation</i>	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Develop a Fund Raising Strategy	Appoint a person to develop and deliver a Fund Raising Strategy (FRS) based on our overall Aims	FRS in place and actions being taken.	The Board
2. Visitor numbers on steaming event days increased	Sustained and intensive marketing campaign and attractive programme of events Adopt a framework of events on which to develop activities.	Annual visitor numbers on steaming event days approaching 2400.  More events being held each month	The Board
3. Visitor numbers on non-steaming days increased	Sustained and intensive marketing campaign and more events between steaming days.	Annual visitor numbers on non-steaming event days approaching 1000.	The Board
4. Gift Aid income increased	Actively promote Gift Aid to all visitors	At least 60% of visitors opt for Gift Aid	The Board
5. Increase financial contributions from 'Friends'	Promote the membership structure which now includes 'friends' as distinct from 'active' volunteers.	Annual income from Friends = £ 750 by 2018.	The Board
6. Improve secondary spend by visitors	Actively increase and develop retail and refreshment sales. Hire out Team Room and Foreman's Office.	An increase in secondary spend to 3.5% per year achieved by 2018 Generate at least £2,500 per annum	The Board

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference: OP03</b> <b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No. 3:</b> <i>Effective marketing &amp; promotion of Combe Mill</i>	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Prepare a Marketing Plan	Appoint a person to develop and deliver a Marketing Plan for the Society.	Marketing Plan in place and effective	The Board
	Audit mentions of Combe Mill activities in the media	Increasing coverage in media	The Board
	Optimise our website for search engines	High ranking for all associated word searches	The Board
	Monitor presence in social media		The Board
	Begin direct mailing to members and subscribers (e.g. MailChimp)		The Board

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference: OP04</b> <b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No.4:</b> <i>Develop organisational structure and strengthen Board</i>	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Strengthen the composition of the Board	Seek fresh Board members	Diversity of experience and age profile in Board.	The Board
2. Establish working parties for projects within the Business Plan	Define terms for each working group and assign one Board member per group	Working Groups set up and working to effective end dates for: a) Engineering b) Volunteer co-ordination and training c) Operations (front of house and events) d) Marketing and promotion e) Retail sales f) Education	The Board
3. Re-write role descriptions to attract applicants	Pro-actively seek to attract more stewards and active members	Active membership increased to 60 Stewards recruited not necessarily having an engineering background.	The Board

<b>TABLE 2</b>	<b>Combe Mill Society</b>	<b>Sheet Reference: OP05</b>	<b>Issue No: 1</b>
<b>Title: Operational Plan Objectives and Priorities</b>		<b>Page No. 1 of 1</b>	
<b>Key Aim No.5: Obtain Arts Council Accreditation</b>			

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Apply to determine eligibility to seek accreditation	Register for Accreditation	Registration accepted	The Board
2. Identify a Museum Mentor to work with		Museum Mentor engaged	The Board
3. Identify gaps in our processes against accreditation requirements for a small museum	Set up a work group to identify gaps and produce a Plan to close such gaps	Convergence Plan written and work in hand to close gaps	The Board
4. Begin recording our objects and collections in a database (either E-Hive or in-house)	Catalogue, photograph and accession objects and collections	All machinery items catalogued. Forward Documentation plan developed for cataloguing remaining objects.	The Board
5. Obtain full Arts Council Accreditation	Prepare documentation and submit	Accreditation obtained	The Board



<b>TABLE 2</b>	<b>Combe Mill Society</b>	<b>Sheet Reference: OP06</b>	<b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities		<b>Page No. 1 of 1</b>	
<b>Key Aim No.6:</b> <i>Develop partnerships with local organisations</i>			

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Establish a further partnering relationships with local Primary and Secondary schools	Person in place to develop relationships with schools and HE establishments	School visit or outreach sessions planned	The Board
2. Explore establishment of relationships with other universities, HE Colleges within a 50 mile radius	Make contact with other higher educational establishments	A relationship established with at least one other educational establishment	The Board
3. Develop relationship with other local museums and historic sites	Person in place to develop relationships with other museums and historic sites	Joint promotions or events taking place that meet the Aims of the Business Plan	The Board
4. Engage with voluntary groups to support the sustaining of the Evenlode Catchment area	Build engagement with Wild Oxfordshire and Sylva Foundation	At least three Evenlode targeted events during 2015 and five in future years.	The Board

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference: OP07</b> <b>Issue No: 1</b>
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No.7:</b> <i>Provide greater learning experience</i>	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Maintain and improve the interpretation of the Mill content and history	Review and improve our 'family' offer		The Board
	Improve non-steaming Sunday activity with reference to the published event framework.	More positive feedback from members and visitors.	The Board
	Introduce more hands-on demonstrations.		The Board
2. Determine opportunities with membership for continuous professional development (CPD) training	Train more engine drivers and blacksmiths.	More diversity of skills within membership.	The Board

<b>TABLE 2</b> <b>Combe Mill Society</b>	<b>Sheet Reference:</b> OP08 <b>Issue No:</b> 1
<b>Title:</b> Operational Plan Objectives and Priorities <b>Key Aim No.8:</b> Maintenance Management and Operations Planning	<b>Page No. 1 of 1</b>

Objectives	Priorities for Action	Performance Measure	Action by whom and when
1. Produce a Maintenance Management Plan for the Mill and its contents	Appoint a person to develop and deliver a Maintenance Management Plan (MMP)	MMP prepared and actively followed	The Board
2. Produce an Operations Plan to document how the Society and the Mill operates	Appoint a person to develop and deliver an Operations Plan (OP)	Operations Plan compiled that is a single point of reference (umbrella document) for anyone seeking to understand how Combe Mill Society is run and the Mill operated and maintained.	The Board

## **9. Resources**

### **9.1. Members**

- (a) Members of the Combe Mill Society, of which several are retired Chartered Engineers, are all volunteers and the majority are above retirement age. Working backgrounds vary and crafts and trades rub shoulders with the professions such that appropriate attention is given to the routine maintenance of machinery. This mix of experience and knowledge also results in visitors receiving a very high value commentary on what is on display and the ratio of guides to visitors is usually high.
- (b) Competencies have been assessed and the results are documented elsewhere.

### **9.2. Assets**

The Society's assets include the current value of equipment, tools and stock and include:

- value of the standby steam boiler and ancillary equipment
- value of riverside Tea Room and its contents
- value of building services (lift, air source heat pump etc.)
- value of water pumps
- fuel oil in store
- value of office equipment
- retail stock
- stationery and office consumables in stock
- printed materials (guide books, posters, etc.)
- IT equipment
- interpretation panels and audio/visual displays
- learning resources
- tools, etc.

### **9.3. Affiliations**

The society subscribes to the following organisations:

- Oxford Museums Council
- Association of Industrial Archaeology
- Association of Independent Museums
- Rural Museums Network
- British Association of Friends of Museums
- ISSSES – International Stationary Steam Engine Society
- SPAB Mills Section

### **9.4. Income**

- a) The Society receives no external financial support for its operating costs. Income is generated from door receipts, membership subscriptions and donations.
- b) Historically, grants have been received from West Oxfordshire District Council to fund specific small improvements projects.
- c) Not enough surplus income has been generated in the past to build a reserve fund.
- d) Improvement projects are funded from donations and surplus income from public open days.
- e) Members subscriptions are made using Gift Aid and an annual pass system is used to encourage Give Aided giving for ticket purchases.

### **9.5. Cash Flow**

- a) Appendix A gives a forecast of the current financial year
- b) Appendix B gives a tentative cash-flow forecast for the period 2014 to 2024 assuming a realistic increase in visitor numbers and in our fund-raising activities.

## Appendix A - Forecast Annual Income/Expenditure (01 Apr 2014 – 31 Mar 2015)

(Not linked to source spreadsheet)

2014/15	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
<b>Mill Operations</b>													
Income													
Income from Fundraising Activities	£ 651.34	£ 653.24	£ 1,181.44	£ 910.70	£ 806.42	£ 1,068.84	£ 1,013.31	£ 74.00	£ 200.00	£ 100.00	£ 50.00	£ 580.00	£ 7,289.29
Income from Charitable Activities	£ 1,259.50	£ 946.56	£ 1,367.50	£ 1,499.00	£ 1,169.00	£ 1,340.50	£ 1,750.00	£ 75.00	£ -	£ -	£ -	£ 817.00	£ 10,224.06
Other Receipts	£ 240.00	£ 0.01	£ 102.17	£ -	£ 139.65	£ 105.65	£ -	£ -	£ -	£ -	£ -	£ -	£ 587.48
Volunteer Income	£ 70.58	£ 1,511.98	£ 514.60	£ 60.00	£ 42.26	£ 55.48	£ 39.92	£ -	£ -	£ 735.00	£ -	£ 80.00	£ 3,109.82
Tax Rebates	£ -	£ -	£ -	£ 1,707.32	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ 1,707.32
Interest Received	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Door Key Deposits	£ 5.00	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ 5.00
													£ -
<b>TOTAL OPERATING INCOME</b>	<b>£ 2,226.42</b>	<b>£ 3,111.79</b>	<b>£ 3,165.71</b>	<b>£ 4,177.02</b>	<b>£ 2,157.33</b>	<b>£ 2,570.47</b>	<b>£ 2,803.23</b>	<b>£ 149.00</b>	<b>£ 200.00</b>	<b>£ 835.00</b>	<b>£ 50.00</b>	<b>£ 1,477.00</b>	<b>£ 22,922.97</b>
Spending													
Cost of raising Volunteer Income	£ 94.46	£ 40.03	£ 12.72	£ 100.08	£ 34.65	£ 7.18	£ 20.30	£ 62.00	£ 62.00	£ 62.00	£ 62.00	£ 62.00	£ 619.42
Cost of Fundraising	£ 655.91	£ 381.77	£ 1,112.83	£ 417.51	£ 325.06	£ 687.33	£ 260.68	£ 11.00	£ 46.00	£ 611.00	£ 711.00	£ 496.00	£ 5,716.09
Costs of Governance - Upkeep	£ 690.36	£ 343.30	£ 663.11	£ 126.15	£ 28.44	£ 393.10	£ 54.70	£ 998.00	£ 279.00	£ 738.00	£ 858.00	£ 1,038.00	£ 6,210.16
Costs of Charitable Activities	£ 1,161.32	£ 81.20	£ 631.80	£ 624.69	£ 71.48	£ 803.04	£ 99.22	£ 660.00	£ 250.00	£ 1,100.00	£ 350.00	£ 1,910.00	£ 7,742.75
Costs of Governance - Admin	£ 58.15	£ 198.07	£ 221.50	£ 268.41	£ 102.02	£ 941.00	£ 1,688.32	£ 80.00	£ 260.00	£ 405.00	£ 150.00	£ 40.00	£ 4,412.47
Door Key Deposits	£ -	£ -	£ -	£ -	£ -	£ 5.00	£ -	£ -	£ -	£ -	£ -	£ -	£ 5.00
													£ -
<b>TOTAL OPERATING SPEND</b>	<b>£ 2,660.20</b>	<b>£ 1,044.37</b>	<b>£ 2,641.96</b>	<b>£ 1,536.84</b>	<b>£ 561.65</b>	<b>£ 2,836.65</b>	<b>£ 2,123.22</b>	<b>£ 1,811.00</b>	<b>£ 897.00</b>	<b>£ 2,916.00</b>	<b>£ 2,131.00</b>	<b>£ 3,546.00</b>	<b>£ 24,705.89</b>
<b>Overall cash flow</b>													
TOTAL INCOME	£ 2,226.42	£ 3,111.79	£ 3,165.71	£ 4,177.02	£ 2,157.33	£ 2,570.47	£ 2,803.23	£ 149.00	£ 200.00	£ 835.00	£ 50.00	£ 1,477.00	£22,922.97
TOTAL SPEND	£ 2,660.20	£ 1,044.37	£ 2,641.96	£ 1,536.84	£ 561.65	£ 2,836.65	£ 2,123.22	£ 1,811.00	£ 897.00	£ 2,916.00	£ 2,131.00	£ 3,546.00	£24,705.89
VARIANCE	<b>-£433.78</b>	<b>£2,067.42</b>	<b>£523.75</b>	<b>£2,640.18</b>	<b>£1,595.68</b>	<b>-£266.18</b>	<b>£680.01</b>	<b>-£1,662.00</b>	<b>-£697.00</b>	<b>-£2,081.00</b>	<b>-£2,081.00</b>	<b>-£2,069.00</b>	<b>-£1,782.92</b>
CFWD	£22,545.69	£24,613.11	£25,136.86	£27,777.04	£29,372.72	£29,106.54	£29,786.55	£28,124.55	£27,427.55	£25,346.55	£23,265.55	£21,196.55	
BFWD from last year	£22,979.47												

Data @ 30 October 2014

## Appendix B – Ten-year financial forecast

(Not linked to source spreadsheet)

Year	2014/2015	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
<b>Mill Operations</b>										
Income										
Income from Fundraising Activities	£ 7,289.29	£ 8,000.00	£ 8,500.00	£ 9,500.00	£ 10,500.00	£ 10,500.00	£ 10,500.00	£ 10,500.00	£ 10,500.00	£ 10,500.00
Income from Charitable Activities	£ 10,224.06	£ 11,250.00	£ 12,250.00	£ 13,250.00	£ 14,250.00	£ 14,250.00	£ 14,250.00	£ 14,250.00	£ 14,250.00	£ 14,250.00
Other Receipts	£ 587.48	£ 600.00	£ 600.00	£ 600.00	£ 600.00	£ 600.00	£ 600.00	£ 600.00	£ 600.00	£ 600.00
Volunteer Income	£ 3,109.82	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00
Tax Rebates	£ 1,707.32	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00	£ 1,500.00
Interest Received	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
	£ -									
Door Key Deposits		£ -								
<b>TOTAL OPERATING INCOME</b>	<b>£ 22,917.97</b>	<b>£ 22,850.00</b>	<b>£ 24,350.00</b>	<b>£ 26,350.00</b>	<b>£ 28,350.00</b>	<b>£ 28,350.00</b>	<b>£ 28,350.00</b>	<b>£ 28,350.00</b>	<b>£ 28,350.00</b>	<b>£ 28,350.00</b>
	£ -									
Spending										
Cost of raising Volunteer Income	£ 619.42	£ 700.00	£ 710.50	£ 721.16	£ 731.97	£ 742.95	£ 754.10	£ 765.41	£ 776.89	£ 788.54
Cost of Fundraising	£ 5,716.09	£ 6,000.00	£ 6,090.00	£ 6,181.35	£ 6,274.07	£ 6,368.18	£ 6,463.70	£ 6,560.66	£ 6,659.07	£ 6,758.96
Costs of Governance - Upkeep	£ 6,210.16	£ 6,300.00	£ 6,394.50	£ 6,490.42	£ 6,587.77	£ 6,686.59	£ 6,786.89	£ 6,888.69	£ 6,992.02	£ 7,096.90
Costs of Charitable Activities	£ 7,742.75	£ 8,000.00	£ 8,120.00	£ 8,241.80	£ 8,365.43	£ 8,490.91	£ 8,618.27	£ 8,747.55	£ 8,878.76	£ 9,011.94
Costs of Governance - Admin	£ 4,412.47	£ 4,500.00	£ 4,567.50	£ 4,636.01	£ 4,705.55	£ 4,776.14	£ 4,847.78	£ 4,920.49	£ 4,994.30	£ 5,069.22
Door Key Deposits		£ -	£ -	£ -	£ -	£ -		£ -	£ -	£ -
<b>TOTAL OPERATING SPEND</b>	<b>£ 24,700.89</b>	<b>£ 25,500.00</b>	<b>£ 25,882.50</b>	<b>£ 26,270.74</b>	<b>£ 26,664.80</b>	<b>£ 27,064.77</b>	<b>£ 27,470.74</b>	<b>£ 27,882.80</b>	<b>£ 28,301.05</b>	<b>£ 28,725.56</b>
<b>Overall cash flow</b>										
TOTAL INCOME	£ 22,917.97	£ 22,850.00	£ 24,350.00	£ 26,350.00	£ 28,350.00	£ 28,350.00	£ 28,350.00	£ 28,350.00	£ 28,350.00	£ 28,350.00
TOTAL SPEND	£ 24,700.89	£ 25,500.00	£ 25,882.50	£ 26,270.74	£ 26,664.80	£ 27,064.77	£ 27,470.74	£ 27,882.80	£ 28,301.05	£ 28,725.56
VARIANCE	-£ 1,782.92	<b>-£2,650.00</b>	<b>-£1,532.50</b>	£79.26	£1,685.20	£1,285.23	£879.26	£467.20	£48.95	<b>-£375.56</b>
CFWD		£19,413.63	£17,881.13	£17,960.39	£19,645.59	£20,930.82	£21,810.08	£22,277.28	£22,326.23	£21,950.67
BFWD from last year	£21,196.55									

Spending inflated by 1.5% per annum