**YMT Business Plan narrative 2021/22**

The Business Plan narrative is for the 2021/22 period and is supported by a financial envelope in the 2021/22 budget for YMT and the more detailed business plan showing the outcomes and activity supporting the plan and the targets we intend to have achieved by March 2022.

1. **Vision and Mission**

In 2019 we revisited our vision and mission and had consulted with stakeholders and gained Trustee approval to this.

**Our vision**

**To work together with audiences and communities to inspire, to share and to care for cultural heritage.**

**Our mission**

**York Museums Trust shares collections, gardens, buildings, art and stories for learning, enjoyment and wellbeing. Rooted in York and Yorkshire, we look outwards nationally and globally. As a charity, our income enables the Trust to care for heritage and to benefit all.**

1. **Background and context**

The last 12 months have changed everything. We have had to survive a global pandemic which required shutting our sites for much of the year. Given our dependency on visitor income and associated income-generating activity, YMT has had to prioritise financial survival and reopening sites whenever possible.

Financially we have lost nearly £3 million of income normally generated through visitor admissions, with further losses incurred because of the closure of our cafes, shops and weddings and events venues. This has put us under huge financial strain and has meant we have had to make very difficult decisions to enable to us to survive and rebuild, including losing 30% of our staff through redundancies last year.
It is only with support from Arts Council England, DCMS and the City of York Council as well as the generosity of the many people who have donated to us over the last 12 months that we have been able to continue to this point.

Throughout such a challenging and difficult year there have been moments of brightness and real change. York Museums Trust was quick to embrace new ways of sharing collections and stories with audiences and this resulted in some real successes, such as the now world-famous Curator Battles on Twitter. This simple idea of asking museums to share objects under a given theme meant our objects were seen by more than six million people, with 50% of those engaging with York Museums Trust for the first time. Another success were the Takeovers of our social media feeds, working with community groups to shed new light and share different perspectives on the collections in our care.

We were delighted to be able to reopen York Art Gallery (YAG) and York Castle Museum (YCM) on August 1. The very nature of the pandemic meant we had to be agile in our response and this encouraged a spirit of experimentation in our approach. At York Art Gallery more than 400 people helped us choose what paintings would be in our reopening display and we celebrated the key workers and NHS in a community exhibition entitled *Our Heroes.* We opened our permanent collections galleries for free, with a Pay As You Feel approach to our main exhibitions, acknowledging how valuable arts are to audiences in difficult times. At York Castle Museum, where free-flow visits weren’t practical with social distancing, we created a new range of guided tours, which were extremely popular. Our Christmas offer, featuring projections on our famous Victorian Street Kirkgate, was also a hit, despite the huge challenges of creating a new offer during a second national lockdown.

For most of the year, York Museum Gardens has remained open. We already knew this was such an important green space for the city, but the pandemic has emphasized how important it is to the wellbeing of so many. Likewise, the importance of culture in times of crisis has been abundantly clear and we have been touched by the many positive comments we have received from visitors and those engaging with us online.

Subject to Covid restraints, York Museums Trust aims to reopen York Castle Museum on 19 May and York Art Gallery on 28 May. The Yorkshire Museum is more difficult to run in a safe, socially distanced and financially viable way so we are hoping to reopen in on 9 July.

The impact of the pandemic will leave a lasting legacy on the Trust in many ways. Financially we predict we will continue to need support for at least the next two years as we begin to recover from the huge losses entailed. There is also a positive legacy. In times of such difficulty, it has allowed us to focus on changes we need to make in a post Covid world. The Black Lives Matter movement has given real momentum for the need to stand up to racism and challenge outdated ways of thinking. We have a part to play in this by questioning and provoking debate as well as challenging and changing the way we think as an organisation.

1. **Looking forward with our community**

Our vision agreed by Trustees in February 2020 is **To work together with audiences and communities to inspire, to share and to care for cultural heritage.** This vision acted as our guide through the Covid crisis to date and the crises emerging in society in 2020 have made clear how timely this renewal of our vision was.

Closures because of the pandemic meant that York Museums Trust shifted to digital at a higher speed than planned and we are more than ever aware of greater change needed. Economic hardship faced in our communities challenges us to rethink access by our local communities and take down barriers to participation. A sharper sense of the local, whilst travel is limited, creates new opportunities to think local and work with local people more closely. People’s instinctive turn towards culture, painting rainbows at the height of crisis, underscores the relevance and importance of culture in communities.

Our focus is on recovery and rebuilding together with our communities then. As an experiment, we have removed entry charges to York Art Gallery and we intend to continue free access supplemented with ticket charges for exhibitions and an increased push for donations and café and shop spend. With free entry we hope to see a younger demographic engage more with York Art Gallery and have already begun to see ripples of more positive engagement with local communities. Now seems the right time to try such an experiment signalling that as we recover financially we want to do so in a way that works for our communities as they also recover financially.

We are proud to have maintained free access to York Museum Gardens despite our loss of staff. In future we will manage the Gardens with more volunteers recognising not only the benefits to active volunteers of productive work with nature, but also asking people to work with us to maintain the wider social benefits of a safe and managed green space for everyone in the city. Our gardens alongside our natural history collections are a fantastic resource for everyone to engage with issues of climate change and in future years we intend to continue this work building on the reconnections with nature locally that many have made in 2020.

We have begun an internal culture change process aimed to make York Museums Trust anti-racist and we have a programme of work planned to embed equity and to challenge and change the way we think as an organisation, as promised in our Black Lives Matter statements of 2020. We need to be inclusive and relevant. We aim to improve the diversity of our workforce and ensure that all staff feel they belong in York Museums Trust as an inclusive organisation. We will continue a relevant public programme with exhibitions such as that on Richard III which will tackle issues around disability.

As we look to further our efforts to remain relevant, engaging and of real value to the people of York, to whom these collections, buildings and gardens belong, we commit to working together with our communities to inspire, share and care for all our cultural heritage. We have been encouraged by the large number of people donating to York Museums Trust in 2020 as well as our success fundraising from government and trusts. Fundraising will be a key point of engagement with our supporters in 2021-22 and we will be introducing new patrons’ schemes.

Having concluded our Visioning process in early 2020 and with the opportunity to embed it now most staff are returned from furlough in 2021, we turn our attention to a similarly democratic process involving staff in agreeing a set of corporate values. Some values were captured through the original visioning process and we will return to these for discussion with staff and build a set of values to guide internal and visitor-facing behaviours.

1. **Priorities for 2021/22 business plan**

Our most immediate **YMT priority 1** for 2021/22 is to:

*1 Survive* *the Covid crisis and work together with audiences and communities to recover and rebuild.*

Our four medium term **YMT** **priorities** are to:

1. *Deliver innovative public programming which supports an audience-focused, inclusive, visitor-first approach​;*
2. *Progress two capital projects: the Castle Transformation Project and the Collections Development and Storage Project;*
3. *Increase our resilience by expanding enterprises and fundraising activities, investing in our people, and caring for our environment; and*
4. *Improve York and York Museums Trust’s profiles through local, regional, national and international leadership and partnership to maximise YMT’s impact*.

We recognise that Arts Council England (ACE) outcomes and ACE four investment principles need to be embedded in this plan as a band 3 NPO and will be increasingly shown in future plans.

The **ACE outcomes** are**:**

*A1: We want creative people*

*A2: We want cultural communities*

*A3: We want a creative and cultural country*

The **ACE Investment Principles are:**

*IP1: ambition and quality* - Cultural organisations and individuals are ambitious and committed to improving the quality of their work​.

*IP2: dynamism* - Cultural organisations and individuals are dynamic and able to respond to the challenges of the next decade​

*IP3: environmentally responsible* - Cultural organisations and individuals lead the way in their approach to environmental responsibility ​

*IP4: inclusive and relevant* - England’s diversity is fully reflected in the individuals and organisations we support and the culture they produce​

We receive £300k of grant funding each year from **City of York Council**. As a condition of this funding we have to report to their scrutiny panel each year on our activity.

1. **Survive the Covid crisis and work together with audiences and communities to recover and rebuild.**

The activity in this priority is focused to ensure our survival in the short term. The activities therefore fall in 2021 and 2022. As we discovered in the pandemic in 2020 we are able to make short term decisions using the YMT Vision and Mission as principles that ensure our longer term direction.

In order to help us with our reopening we have been awarded £423,226 from the DCMS Cultural Recovery Fund round 2 for viability and sustainability. This funding provides for part of the costs we will incur in the period April – June 2021.

We hope to be able to open York Castle Museum on 19 May with a range of guided tours designed to give fascinating new insights into some of our most famous displays. We are continuing to use these models that we were testing in 2020 during the pandemic. These have two purposes: to reach new audiences, and as an income generating measure whilst we cannot safely operate our normal route or number of visitors. As social distancing restrictions are lifted in 2021 it is our intention to return to a free flow model at York Castle Museum that will allow us to welcome more people.

The removal of social distancing will enable us to reopen the Yorkshire Museum in July 2021 with a Richard III exhibition. Visitors will be charged for entry to the museum which is the model we used prior to the pandemic. We will need to review visitor numbers in October 2021 to determine whether to shut the Yorkshire Museum again for the winter of 2021, during the low season. We will recruit temporary staff to cover the increased operational staff requirements in the July to October period so that our permanent headcount is not increased.

At both York Castle Museum and the Yorkshire Museum we will be revising our pricing and introducing an annual ticket. This responds to the likelihood that more of our audiences will be local by enabling them to return across a year after they have bought a single ticket and at the same time will deliver a higher Gift Aid return to the Trust and a better customer journey.

We hope to reopen York Art Gallery with the launch of a major new exhibition *Grayson Perry: The Pre-Therapy Years.* At York Art Gallery we trialled free entry when we were able to reopen after the first lockdown in 2020. This generated additional visitor numbers and we performed notably better than other venues during this period at about 60% of the previous year’s visitors. However, we were disappointed with the income received during the trials conducted on Pay As You Feel for exhibitions. Visitors did not pay the value of the exhibitions or donate to any meaningful level. Our strategy in 2021 is therefore to try to generate sufficient income as well as increased visitor numbers by offering free entry to the permanent collection on display with income driven by a number of attractive temporary exhibitions planned for 2021 including exhibitions on Grayson Perry, Gainsborough and the Bloomsbury Group. These will all be ticketed and will be charged at a set rate.

In terms of operational efficiency, we reduced our headcount by 30% in 2020 through a voluntary and compulsory redundancy process. This means we now open our sites for five days week on a slightly shorter hours then we have historically operated. This enables us to operate a simple one shift model at each site. It's easy for staff to understand and straight forward for our visitors and audiences. Our days of operation are Wednesday to Sunday, as these are historically the days we see most visitors.

Our commitment to make progress in 2021 on Equity Diversity and Inclusion (EDI) includes staff training:

* All staff EDI introduction training by December 2021
* Cultural awareness training by Dec 2021
* Anti-racism training by December 2021; and
* Active bystander training by March 2022

Training alone is insufficient to make culture change. We are allowing the time in the business plan to embed change by allowing for discussion with staff and managers. We have targets to review policies and procedures to support better practice as well as to continue to improve our recruitment. As discussed under programming, we continue to work hard to deliver the ACE Creative Case for Diversity through meaningful engagement with contemporary issues. As part of working with our local community to recover and rebuild we have committed to support Speak Up Diversity, a local organisation set up to make York an anti-racist city.

We have invested in our IT and digital platforms in 2020/21. This initially enabled us to operate the organisation remotely and for staff to work safely at home. As we open up and are allowed to return to office working the platforms we’ve invested in will enable staff to work more flexibly. We will be training staff to become more expert in the online tools we have created. We are continuing to put more of our processes online which creates efficiencies. We are also investing in the customer journey and will be upgrading the online booking and ticketing processes to improve and enhance the visitor experiences and to allow visitors to customise their own experience.

Our first duty of care to staff during the pandemic has been to enable them to continue working safely at home. When we have re-opened we have undertaken a full Covid risk assessment and staff have been provided with the appropriate training and PPE. We have invested in and made a commitment to continue to allow flexible working for staff beyond the pandemic. A priority for us in 2021/22 will be mental health issues and we have a number of initiatives delivered and planned including, training to ensure managers prioritise staff well-being.

In 2021 we are taking delivery of the A1 archaeological archive. This is a major challenge for our curators but at the same time an opportunity to continue to develop our collections and management policies and review our long term storage needs following the policy review.

We will need to allow teams sufficient time and resource in quarter 2 to develop a draft 2022-23 business plan for submission to ACE. This will need to evidence further thinking and use of the four ACE Investment Principles in the delivery in this period. Following consultation and feedback from ACE we will prepare a final plan for 2022-23 by Christmas 2021. We will start preparing an NPO funding bid for the period 2023-27 from the autumn of 2021 and will submit this in March 2022.

1. **Deliver innovative public programming which supports an audience-focused, inclusive, visitor-first approach;**

The 2020 trial of free opening at York Art Gallery (YAG) had an immediate impact on visitor numbers and was well received. We were hoping to evidence in this trial that free entry would deliver new, wider audiences. From the initial evaluations the audiences were very local in the summer of 2020, given the exceptional circumstances in the middle of a global pandemic. However we believe that offering free entry to the York Art Gallery collections on permanent display is a significant step in us achieving an audience-focused approach and reaching new audiences. In charging for our temporary exhibitions we will be testing audiences’ reaction and appetite for paying for quality exhibitions. We have built our own exhibition pricing model and systems to enable us to adapt and change our price points in response to audience demand / feedback. We have been using the Impact and Insight toolkit and will be continuing to use this for evaluation of events and exhibitions in 2021/22

We will be looking at new ways we can co-create exhibitions with our audiences starting with the Gainsborough exhibition in YAG in 2021. The objective will be to bring some different voices to some very traditional art. We are also putting our regular Teenage Art School in the exhibition for the first time so that the response of the young artists are embedded in the experience. We will learn from the Gainsborough exhibition and apply what we learn to the upcoming Bloomsbury exhibition in 2022. Real time and thorough evaluation of audiences and engagement through the use of tools such as the Impact and Insight toolkit and the Audience finder will help shape this engagement and our approaches in 2022/23 plans.

Having piloted an approach to accessioning and deaccessioning collections in advance of receiving the A1 archive in 2020/21 we will be taking receipt of the archive in 2021/22 and planning for its future. The outcome of the new approach is that we can plan to have good quality collections that are properly documented and so can be better curated.

At York Castle Museum in 2021 we will have a focus on contemporary collecting. In these extraordinary times it is appropriate to collect materials representing the Covid 19 impact on lives and communities in York and Yorkshire as part of our national collection of everyday life. We will explore the opportunities this presents with new audiences, different and harder to reach community groups as well as through new collection techniques such as crowd sourcing.

At the Yorkshire Museum a Richard III exhibition in July 2021 will create an opportunity to work with the York Disability Forum to explore lived experiences of disability and to reinterpret and understand historical narratives from the perspectives of people with lived experience of physical disabilities.

We have recognised the need in 2021 to do more focussed collection research on fewer areas as we have less resources. We are determined that our future research is of greater depth and quality, able to challenge received wisdom including around decolonisation. We have supported York Civic Trust to apply successfully to the Association for Independent Museums for a Hallmark Grant for an EDI research project around the representation of race and Empire in York and North Yorkshire with Ryedale Folk Museum and YMT as partners. Other important research will support a planned relaunch of our Roman Galleries at the Yorkshire Museum which need new and fresh narratives and interpretation and presentation. We need to continue to digitise our collections and our collection records to enable greater public involvement and to further our medium term goals of citizen curatorship.

As part of our long term commitment to contemporary art and artists we will be hosting Aesthetica 2021 prize winners and exhibitors at YAG in 2021. This will be the fifth year we have hosted this national award in York.

York Museum Gardens have remained open throughout the national lockdowns since June 2020. They have provided significant enjoyment to the many local people providing access to a quiet, high quality green space in the centre of York that is free to all. We will continue to open this site for free throughout 2021/22. It is open everyday to visitors. The gardens provide a range of opportunities for engagement, particularly on contemporary issues such as health and well-being. We plan a project to support the well being of vulnerable adults in this period. Because of the subject matter we intend to join this up with the Gainsborough exhibition in YAG.

1. **Progress two capital projects: the Castle Transformation Project and the Collections Development and Storage Project;**

In December 2019 we delivered our planned RIBA 1 report for the Castle Transformation project. We submitted an expression of interest in early 2020 for a major grant of NLHF funding but were unsuccessful. The RIBA 1 report costed a scheme that takes nearly 10 years to complete and could cost as much as £70m. The pandemic has slowed progress on the project as fundraising for this has become more uncertain but we used to the time to re-examine the requirements for the project and test some of the architectural solutions. We are currently completing an exercise which identifies and costs some stand-alone packages of work, including essential repairs and conservation, to improve the existing buildings as well as a Conservation management plan for the whole site.

We will focus the research in our collections on untold stories and narratives associated with the collections in the Castle in 2021/22. An example of these are the prisoner stories and in particular their transportation from York prison to the penal colonies overseas, which has been little researched to date. This research is vital to better understand how we shape and design the new museum and how we attract and engage and involve audiences and communities. We are also beginning to envisage a potential engagement project to ensure that further development of the project continues to be based on the views and aspirations of the public. This project could in part develop the brief for a RIBA stage 2.

The CTP is planned within the context of a wider Castle Gateway Masterplan led by CYC. We have been fully supportive of their phase 1 of the plan which has had the objective of removing the unsightly surface Castle car park from the area around Cliffords Tower, Eye of York and YCM. We remain a major partner in the scheme with CYC and English Heritage and the next phase is the closure of the car park in 2021/22 and a new public realm being delivered in 2022/23. We are working with CYC on public engagement activity on the plan in 2021 to ensure the local communities, businesses and visitors needs are accommodated in this unique place which is full of historical resonance. We will be seeking to retain some space within the Public Realm for the footprint of a new building or extension to the existing Museum.

We will develop and test York Castle Museum tours in 2021/22 both for commercial testing but also as a mechanism of engaging with the public and offer to communities to help with the development of the project.

We will be handing land back to CYC at the rear of the Castle museum in late 2021 as part of the Phase 1 Castle Gateway project which will allow the public access to the gardens on the banks of the Foss and new views of the York Castle Walls.

1. **Increase our resilience by expanding enterprises and fundraising activities, investing in our people, and caring for our environment**

The pandemic decimated YMT visitor numbers and visitor income and also removed the 5% of our income we usually generate from associated commercial activity including venue hire and concessions. We have however used the opportunity to build and implement systems to take online bookings and manage visitor numbers and will add to these popular applications that expend online retail opportunities in 2021/22.

We have found a great partner at York St Mary’s who will continue to deliver popular, high quality immersive exhibitions on art such as Van Gogh and Monet in 2021/22 and provide us with a reliable rental income.

We saw a lot of early enthusiasm and individual giving from the public in response to our appeals at the start of the pandemic but the amount of giving has waned. As part of our plan to diversify our income and create a more robust business model we have recently in March 2021 invested in two new fundraising managers: for individual giving; and for sponsorship and grants. This will enable us to develop and implement our patrons and supporters schemes in 2021 and set more ambitious and reliable fundraising targets from philanthropy, grants and sponsorship.

Both Covid and Environment Agency Floodbank works have disrupted our Enterprises catering. We have an opportunity to explore different ways of providing catering at YCM when we reopen in 2021. Our wedding venue at the Hospitium will undergo a refurbishment during its forced closure from August 2021.

We will also seek to quantify the increased public benefit from initiatives such as free entry to our permanent art collections. This will mean a focus on evaluation and raising our own awareness of measurement and advocacy opportunities. We hope to build a strong case to continue free entry at York Art Gallery with the help of increased public sector income in recognition of evidenced public benefit. as we have evidenced that there will be a shortfall in income in this business model (increased visitor numbers at the expense of visitor income).

Digital leadership in 2021/22 will continue to be shown through the supporting of digital engagement and content. This was well evidenced in 2020/21 through YMT initiatives such as #CuratorBattle. We have developed a digital toolkit which we will continue to share with the sector and through MDY.

We are using digital to provide staff with the equipment and software to work flexibly during this period. In 2021/22 we will continue to invest in staff training and development as staff have become more used to different ways of working, that are more productive for them and YMT.

We need to recognise that in this difficult financial period recruitment opportunities are few and far between and therefore they must be the best they can be to diversify our workforce and make us attractive to new pools of talent. We will continue to improve our understanding of EDI in the workforce and in our communities. We will invest in staff EDI training and upskilling as expressed above but also involve all staff in culture change that cuts across departments and levels. This will include enabling a new staff change group and encouraging open discussion of issues.

Our commitment to tackling the climate crisis remains undiminished. We have seen the adoption of more digital activity in 2020/21 having a really positive impact on reducing the amount of printing by over 90% and will want to retain this improvement. Our energy consumption is now benchmarked but remains too high. We have inherited very difficult buildings and stores and we need to research and plan more sustainable ways of delivering more comfortable visitor and working environments as well as sustainable collections management. We expect this to entail further capital investment but with a payback of reduced costs and carbon and other emission consumption.

We have planned opportunities for engagement on environmental responsibility and climate change with the public through the garden engagement in particular where we will start to recruit volunteers and communities to enable them to understand and advocate for these issues themselves.

1. **Improve York and York Museums Trust’s profiles through local, regional, national and international leadership and partnership to maximise YMT’s impact.**

We have demonstrated significant national and international reach through innovation and digital engagement with wider audiences throughout 2020/21. Our international profile has grown and led to digital partnership discussions with the Louvre and the Hermitage. We will continue this engagement in 2021/22. The amount of individual donations and stakeholder financial support demonstrates recognition of our local and national importance. Our key partners will remain City of York Council through whom we gain access to all communities in York and can be meaningful partners on the social and other issues that are of public priority and concern as well as playing a key part in York’s economic recovery through our venues’ contribution to the return of York’s reputation as a destination city.

We have been used to working in partnerships in a certain way, more often seeking to take a lead and identifying more strongly with our own outcomes. These partnerships then dry up because we have not set up shared outcomes at the outset. Our intention is therefore to build fewer but stronger partnerships. We also intend to build on the approach we have taken with the Castle Transformation Project where we recognise that our buildings and collections are assets that we must share with our communities in ways that are most meaningful to those communities. Learning lessons and setting plans for future partnerships with organisations and groups will be taken forward in 2021/22 prior to implementation in 2022/23.

Examples of long term partnerships we will continue to prioritise in 2021 include Human rights, history and art history partnerships with University of York (UoY) and digital partnerships with UoY and University of Glasgow. We remain committed to well established local partnerships with Yorkshire Philosophical Society and Friends of York Art Gallery. In 2021/22 we are working with the National Portrait Gallery on projects both at York Art Gallery and Yorkshire Museum. Nationally our longer term partners include the National Gallery and British Museum.

Date: 31 March 2021