

Founded: 1903

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BOURNEMOUTH NATURAL SCIENCE SOCIETY

STRATEGIC PLAN 2016 – 2019

Version June 16

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1. Acronyms and definitions

BNSS	Bournemouth Natural Science Society
CIO	Charitable Incorporated Organisation
CPP	Child Protection Policy
Goal	Generic term to describe any level of aim
H&S	Health and safety
HR	Human Resources
Indicators	Measures of success for each objective
LA	Local Authority
Mission	What BNSS will do to achieve our Vision
NGO	Non-Government Organisation
Objectives	BNSS's 3 year operational goals to be achieved within the period of this Strategic Plan
SMART	Objectives should be: Specific, Measurable, Achievable, Realistic, and Time-limited
SORP	Charity Commission Statement of Recommended Practice
SWOT	Strengths, Weakness, Opportunities, and Threats analysis
Targets	BNSS's 3-10 year mid-term goals indicating the main areas of work.
Vision	What BNSS wants the world to look like

2. Summary

This strategic plan sets the direction of BNSS for the next three years. It is therefore a three year bite-size piece of our ten year, long-term Targets.

It identifies key priorities of work based on a number of core work areas, and gives an indication of how, when, and by whom these priorities will be achieved.

See section 4.1 for more information on how to use this document.

3. Context

3.1 Format, purpose & audience

This strategic plan seeks to set out the aims, direction and strategy for BNSS for the next three years from 1 April 2016. Whilst the charitable aims of BNSS remain unchanged, the direction the organisation will take to achieve those aims needs to change considerably to keep up with the times. This plan describes all elements of the business required by a small charitable trust to run in a safe, stable, efficient and effective way. It is an indication to the public, members and Charity Commission alike that thought has been put into the future of the organisation.

This document is not confidential and it may be published. It has been written in a technical style because it is aimed primarily, but not exclusively, at Trustees, volunteers and members who work within the organisation.

In this document we have sought to include as many aspects of the BNSS's activities as possible so that all relevant information is together in one place. This also helps to achieve a more integrated approach to the work that needs to be done. This plan, because of its style, comprehensiveness and length should therefore be treated as a reference document where relevant information can be read, without the need to review the whole plan. It can easily be translated into more publically oriented documents and explanations as required.

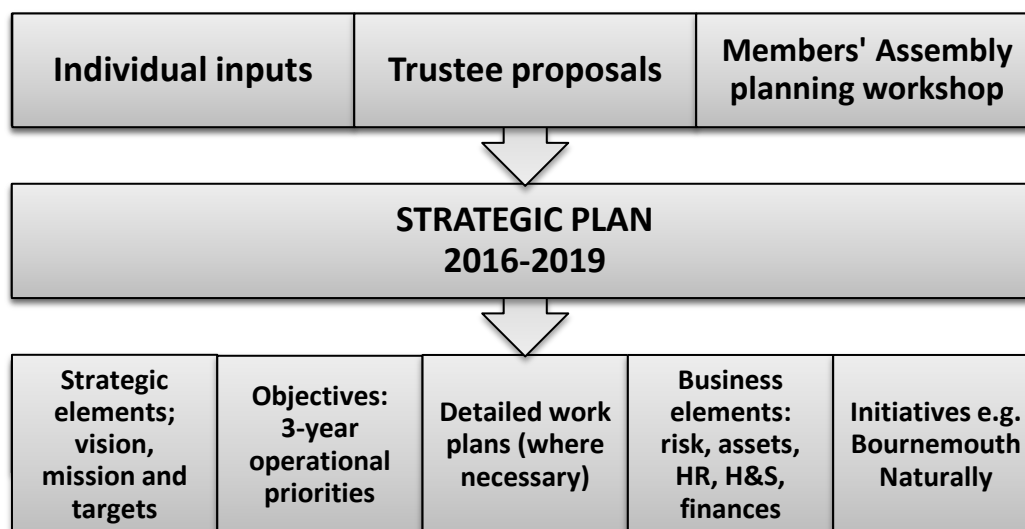


Figure 1: Strategic planning framework

This plan not only gives direction and informs our work within BNSS, but also forms the basis for dialogue and collaboration with other partners outside of the organisation.

The world is changing fast, as recent financial crises and Government policy changes bear testament to. This document is aimed at 3 years of work because this both is a realistic period to predict activities, and also allows performance to be measured at the end of the period.

This strategic plan is the result of many meetings, consultations and discussions (see Fig.1) and therefore represents the collective thinking of the majority of members and Trustees of BNSS. Thanks are due to all those who gave up their time and energy to participate.

3.2 BNSS's heritage

The BNSS was formed in 1903, and over the years it has had many famous and accomplished members including Alfred Russell Wallace and his son William Wallace. It is a membership society that provides lectures, field trips and study groups in the natural sciences (and associated subjects) to its members and the general public. It is housed in its own Grade II listed premises in Bournemouth which provides space for the lectures and other activities as well as housing the extensive collections including natural history, archaeology, Egyptology and geology.

The Society is managed by the Trustees who deal with the day-to-day running of the Society there are only two paid staff the caretaker and the publicity officer. The Trustees are nominated and elected by the members annually. Additionally there are voluntary officers appointed by the Trustees and members. The Assembly is a members' forum, which meets quarterly to discuss Society matters and implement them, or refer to the Trustees where their involvement is needed.

The Society is a Registered Charity No. 219585. The charitable objectives defined in the BNSS Constitution are: Currently applying for CIO registration.

BNSS CHARITABLE OBJECTIVES

- *The promotion of the study of Science in all its branches and of public education by means of lectures, field meetings, the reading and discussion of papers and in any way that the Trustees, in consultation with the Membership, shall deem advisable.*

The Society is funded primarily by its members' subscriptions plus donations and sales at lectures and open days, and a small amount of income from room hire. Special projects are funded through additional fundraising and grant applications to the appropriate bodies.

3.3 The BNSS offer

The following activities and facilities are offered to members and the public:

- 80 to 100 illustrated talks and 40 guided field meetings annually.
- Exhibitions and themed open days.
- Member study groups.
- Access to specialist knowledge.
- Social activities such as annual coach trip.
- Library housing around 5000 books and journals.
- Volunteer training.
- Quarterly newsletter and detailed programme of events leaflet.
- Hands-on access to collections for research and study.
- Copy of Annual Proceedings.
- Open Tuesday mornings throughout the year to visitors and members (often providing them with a one-to-one tour of the museum).
- Walks, surveys and talks throughout the year.
- A monthly "Young Explorers" club for 7-12 year-olds.
- Engagement with the Society through the website and social media.

3.4 The future

The BNSS has been in existence for over a century and the current premises have been the home of BNSS since their purchase in 1919 (opened 1920). However, in recent years it has been struggling due to sharply declining membership numbers. This has several effects: it means that the membership income is declining to a point where it will be critical within 5 years or we will need to close; that there are fewer people to take on the many tasks, roles and honours that are needed to run a thriving, active society; and that the organisation is in danger of not remaining relevant to the local community. BNSS is not in trouble now, but it will be if action is not taken soon.

The up-side is that members think the BNSS is a worthwhile organisation with great potential. This strategic plan is therefore primarily aimed at reversing the decline in memberships, whilst also addressing a range of related issues.

BNSS's future depends on its ability to achieve success in four main areas:

- Relevance
- Identity
- Profile
- Engagement

Relevance: The work of BNSS has to be relevant to a range of people with different interests and ages. Science, as it is currently interpreted by the Society covers a wide range of interests, but are these subjects of interest to a sufficiently wide membership? The Society needs to link better with the community through partnerships, engagement and inspiration. It needs to stay modern, but without losing its past.

Identity: In order to be relevant and attract the public and members, the BNSS needs to have a clear and understandable identity to which people can relate, and hopefully like. Clarity requires focus and consistency in message and approach. To be understandable, a consistent brand or organisational character is required.

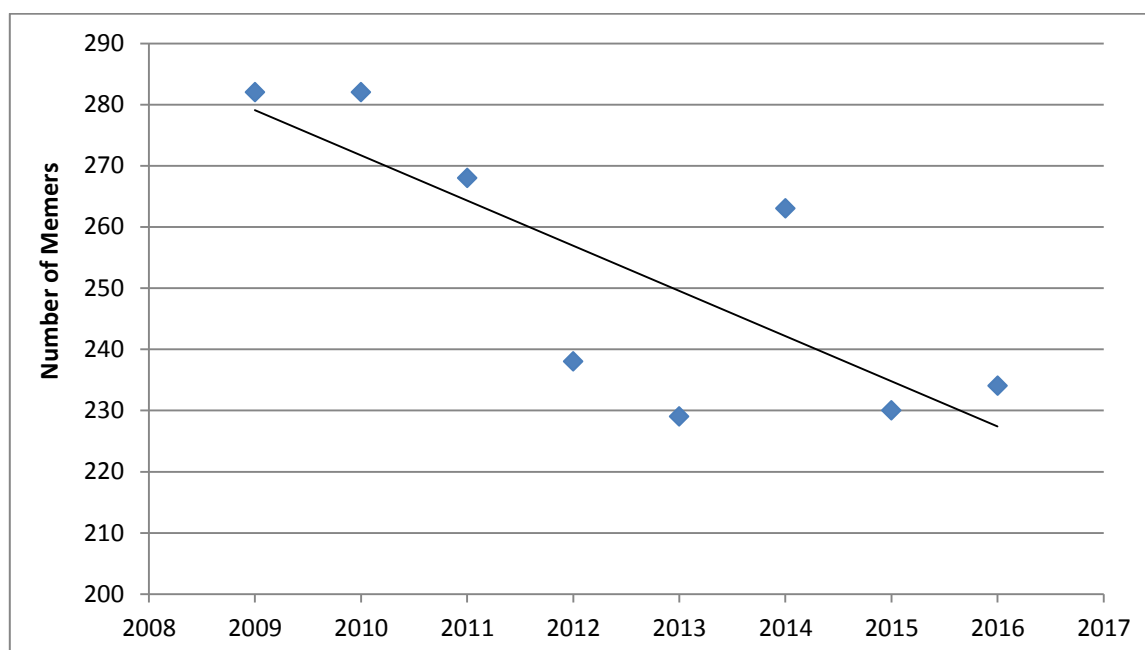
Profile: Profile is associated with recognition, style, results and relevance. We have to engage communities in those issues that are important for them. This requires good intelligence or data, an understanding of community needs, and excellent communications and marketing.

Engagement: We must use a range of techniques and areas of interest to engage a wide range of people to encourage them to join and then remain as members. We must form partnerships with other groups and organisations and we need to look for opportunities to ensure that engagement with the BNSS is valuable and enjoyable.

3.5 BNSS's challenges and opportunities

Membership. The Society's membership reached a low in April 2016, at just 229. Numbers have been falling for several years and could quickly become critical in the next five years. Declining membership means fewer people to take on the many tasks, roles and honours that are needed to run a thriving, active society. Not only have gross numbers been falling, but BNSS also has a narrow age range.

Figure 2: Recent membership decline



In the life of this strategic plan, there has been a concerted effort to engage with visitors and boost membership, which has clearly paid off (aided by the Bournemouth Naturally Project), with current membership around the 240 mark. In order to keep the momentum and continue to encourage new members to join, we need to improve in all four areas mentioned above (relevance, identity, profile and engagement). It will not be adequate to merely launch a recruitment campaign – we need an offer that is clear, attractive and desirable. That means presenting the BNSS in a clear, understandable, attractive way: several steps therefore need to be completed in order to achieve this. There is, however, a huge potential to turn things around.

A Strategic Planning workshop held at the Assembly on 13 April 2013 identified the following possible reasons for declining membership:

- Age range very skewed towards older people; lack of younger members
- Opening times very restricted, difficult for working people, not enough weekend activities
- Not enough volunteers or organisers
- Lack of publicity / poor image
- Poor presentation of museum specimens never changing, and not allied to lectures
- Lack of clear identity, BNSS name is confusing

Memberships are a significant opportunity for the Society. We currently do little marketing or selling, don't have a clear offer and have not focussed on a wide demographic, so the field is open for improvement even with moderate effort. The Bournemouth area has a large population of the demographic likely to be most interested in BNSS, i.e. retired, professional, middle class as well as groups around this such as middle aged professionals. If an appeal for members aimed wider than these groups is made, then even more members may be expected.

Communications and perception. The Strategic Planning workshop stated that they did not like several aspects of communications. These included:

- Lack of publicity of activities and benefits
- Poor image of the Society
- Lack of clear identity
- Communications skewed towards older people

This occurs for three main reasons:

- Lack of clarity about what we want to communicate and the aims
- Shortage of members & volunteers willing to communicate
- Insufficient designated funding

The effects of poor communications include a lack of engagement, poor relations with the community, no branding, and poor or no perception of the Society.

There are many opportunities to redress this and indeed this is being done already with the redesigned website, improved bulletins and Facebook and Twitter presences. We do though need to be much clearer about who we really are and thus what we want to say. We do a lot of interesting things which should be communicated.

Volunteers. A direct effect of a declining membership is that there are insufficient volunteers to do the roles and jobs needed. Those that do volunteer can be overwhelmed with their responsibilities and tasks; this then becomes a vicious cycle as the declining performance of the Society further damages membership recruitment and ability to attract volunteers.

The opportunity with volunteers is that if we can attract new and younger members we should increase the pool available, so reducing work-loads on those few who currently volunteer.

Funding. The other direct effect of declining membership is the decline in the funding they provide – either through subscriptions or through other forms of fundraising such as additional donations and legacies.

Assets. The assets of the Society are also a significant drain on resources at present. These include the Victorian Grade II listed building, health and safety requirements, garden maintenance, and maintenance of the museum collections. These assets must pay their way either directly (e.g. through rental) or indirectly (e.g. through delivery of the Society's charitable aims supported by members). As membership numbers decline the revenue to support the assets declines.

There are, however, opportunities to change the loss-making assets into revenue generating ones.

Museum. The museum specimens are particularly challenging assets in terms of their maintenance. They have the potential, though, to be a key delivery tool for the charitable aims, to attract new members, as an educational resource and to generate revenue.

3.6 Strengths

The members at the Strategic Planning workshop liked the following:

- Finding like-minded people, intellectual chat with informed discussion, wide expertise
- Variety of lecture programme
- Open days, field trips, the open museum days, themed open mornings
- Website

- Ownership of the building and garden, own collections, own library, own exhibitions, and parking spaces
- Coach trip in summer, coffee chats, tea after lecture as an integral part

3.7 *Improvements needed*

The Assembly:

- The Assembly meets quarterly on a Tuesday evening in an attempt to boost attendance; however these meetings continue to suffer from low numbers.
- The Assembly also the occasion when all Trustees, officers and any interested members meet together.
- Members are encouraged to attend and suggest topics for discussion.
- All attending are encouraged to contribute.

Accessibility. In order to be attractive to a wider range of people and groups, the Society must improve its accessibility: including in terms of having a clearly visible and welcoming presence on Christchurch Road; of the scheduling of events (daytime vs evening, weekday vs weekend); and of capacity-building (through additional volunteers or paid staff) to meet demand for what BNSS is (or could be) offering.

4. Strategic elements

4.1 How to use this strategic plan

The most important parts of this strategic plan are the targets and objectives that we set for ourselves, and the necessary actions that we identify in order to achieve them.

See section 5.2 for the key work areas and associated 3-10 year targets; and see section 8 for the actions to be undertaken over the next three years in order to meet those targets.

Take a look, and if there are any that you would like to contribute to, please contact the person named beside that action.

4.2 Vision and Mission

Before setting targets and objectives, however, it is important to define what exactly we are aiming for: we need a vision – which defines how we want the future to look – and we need a mission – which describes how we want to achieve that vision.

BNSS's Vision for the future is that...

- *...its high quality events and facilities draw in the community as a hub to facilitate networking and engagement with the natural world.*

BNSS's Mission, based on the defined charitable aims for the Society is:

- *The BNSS will promote understanding of the natural world through field trips, talks and other means to engage and inspire widely across all sections of the community, and by making best use of its Victorian heritage.*

5. Goal setting

5.1 Target teams and acknowledgements

Eleven core areas of work have been identified as part of this strategic planning process, and each of those areas has been assigned a target for the next 3-10 years (section 5.2).

Teams made up of Trustees, officers and other volunteers identified a number of actions that need to happen in order for the targets to be achieved. Thanks again must go to everyone that was involved in the preparation of this document.

The completed action tables and details of the estimated resources can be found in section 8.

Table 1: Target development teams.

	TARGET	LEAD	TEAM MEMBERS
1.	Membership growth		James Fradgley, Jonathan McGowan, Jane Perry, Mary Thornton, Colin Lord
2.	Fundraising		Gerry Duggan, Anne Jolliffe, Ben Limburn, Steve Limburn, Jane Perry
3.	Marketing and communications		John Cresswell, Mark Spencer
4.	Engaging local communities	Steve Limburn	John Cresswell, Ben Limburn, Jonathan McGowan, Jane Perry, Mark Spencer, Mary Thornton
5.	Staff, volunteering and participation	Mary Thornton	John Cresswell, Ben Limburn, Jane Perry
6.	Museum development	Ray Chapman	Keith Clements, John Cresswell, Renate Haupt, Ben Limburn, Steve Limburn, Jonathan McGowan, Keith Paternotte, Grenham Ireland
7.	BNSS Programme Lectures, field visits and activities	Mike Downing	John Cresswell, Steve Limburn, Jonathan McGowan, Mark Spencer, Mary Thornton, Mary Tiller, Martin Western
8.	Maintenance	Anne Jolliffe	Gerry Duggan
9.	Health and safety	Anne Jolliffe	
10.	Financial management and planning	Gerry Duggan	Hilary Barton, Anne Jolliffe
11.	Governance	Mary Thornton	Hilary Barton, Renate Haupt

Figure 3: Goal setting – how it all fits together



5.2 Targets

The 3 – 10 year targets are BNSS's longer-term goals and indicate the main areas of work of the Society. Many of these targets overlap as they deal with issues from different perspectives.

1. **Membership growth.** Achieve an annual growth of 5% in the number of paying members.
2. **Fundraising.** Increase gross income from fundraising (excluding memberships) by 10% per annum.
3. **Marketing and communications.** Develop an attractive and consistent brand for BNSS that is widely recognised in the east of Dorset.
4. **Engaging local communities.** Increase the number and age-range of people engaging in BNSS activities.
5. **Staff, volunteering & participation.** Ensure sufficient capacity for all roles and responsibilities within BNSS.
6. **Museum development.** To maintain accreditation status and open more frequently.
7. **Lectures, field visits and activities.** Maintain the number and quality of lectures, field visits and activities while attracting a broader demographic.
8. **Maintenance.** Ensure the building, garden and facilities are fit for purpose.
9. **Health and safety.** Ensure legal compliance and that BNSS's risk register is maintained and implemented.
10. **Financial management and planning.** Develop and implement systems to monitor management accounts and adhere to annual budget.
11. **Governance.** Develop and implement best practice management and governance systems (including policies re operating in an ethical and environmentally-friendly manner).

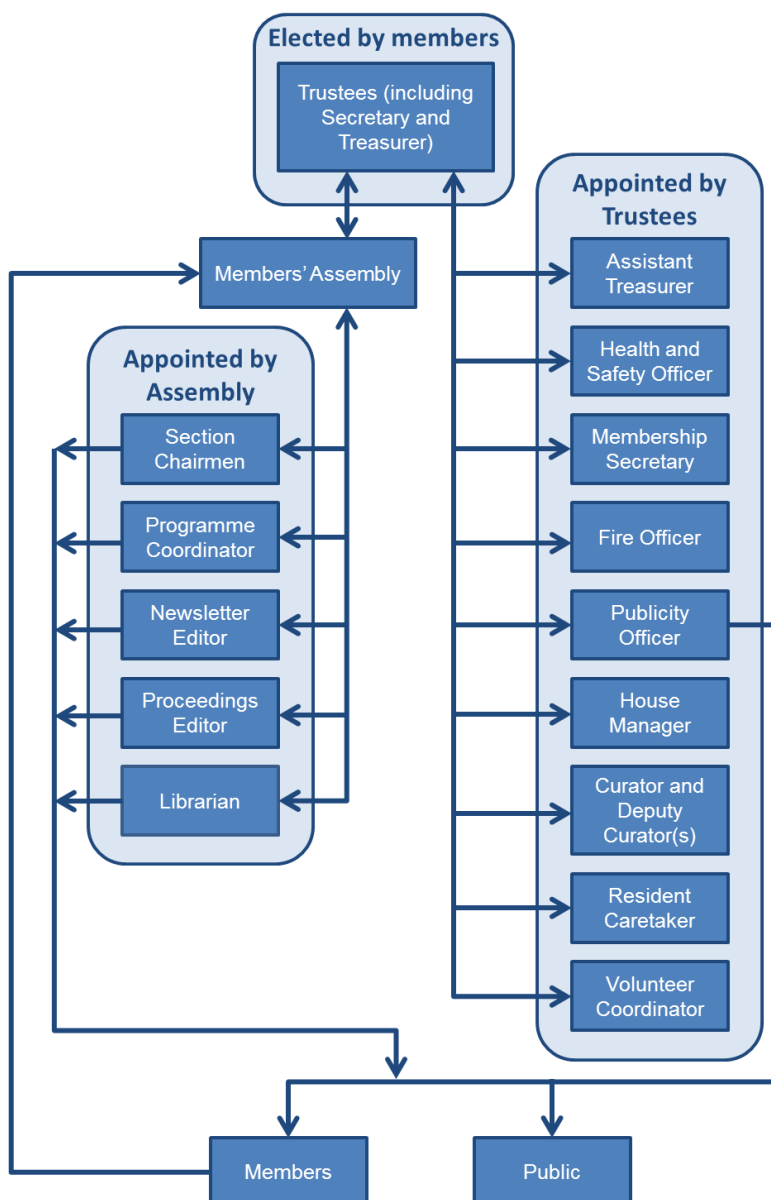
6. Business elements

6.1 Structure, governance and management

BNSS is a registered charity (no. 219585), governed by its Trustees, who deal with the day-to-day running of the Society, working towards the charitable objectives that are outlined in the Constitution. Trustees are nominated and elected by the members annually. Additionally there are voluntary officers appointed by the Trustees and members. The Assembly is a members' forum to discuss Society matters and implement them, or refer to the Trustees where their involvement is needed.

Further details on the governance and management of BNSS can be found in the Constitution – a copy of which is held in the BNSS library or can be requested from the Secretary.

Figure 4: BNSS governance structure



6.2 Financial reserves and investments policy

As a registered charity, it is imperative that BNSS have financial controls that satisfy the expectations of the Law, Charity Commission, BNSS members and the community that BNSS serves. BNSS accounts are audited annually by an independent examiner and submitted to the Charity Commission.

Key policy principles are:

1. That BNSS assets are safeguarded from loss, damage or fraud;
2. That BNSS assets are applied to further our Objects in the most effective and efficient way;
3. That our finances and assets are administered in a way that identifies and manages risk;
4. That the controls in place are proportionate to the risks;
5. That a high standard of record keeping and financial reporting is maintained;
6. That financial reporting is clearly expressed and highly transparent; and
7. That duties are sufficiently segregated in order not to overburden any individual or allow an excessive concentration of authority.

The rest of the policy gives details under the following headings:

- Personal integrity
- Income
- Banking
- Assets
- Reserves
- Wages and salaries
- Reporting
- Compliance

6.3 Risk management

The Trustees have reviewed the risks to which the Society might be exposed and categorised and prioritised perceived risks by potential impact and likelihood of occurrence and set out appropriate risk management strategies. Trustees have established a risk management policy and implemented systems and procedures to mitigate risks identified. All perceived risks are re-assessed on an annual basis and priorities are reviewed in light of prevailing circumstances at that time.

6.4 Professional support

To ensure at a minimum compliance with legislation; to ensure the health and safety of staff; to protect the liability of Trustees and staff; and to manage BNSS in an as efficient and effective manner as possible, professional advice is obtained from a number of external specialists. Currently specialists include:

- Employment law advice – Bournemouth Council for Voluntary Services.
- Health & Safety – Anne Jolliffe, Tower Park.
- Auditor – Louise Tonkin, Fisherton Consulting.
- Legal – Preston Redman Solicitors. Neville Douglas Jones is Hon solicitor.

6.5 Health & safety

BNSS is committed to providing a safe, healthy and secure working environment for its Trustees, volunteers, staff, contractors and visitors.

Overall responsibility for Health and Safety matters is the responsibility of the Chair of Trustees with operational delivery being overseen by a designated Trustee. Additionally, all members and the public have a duty to implement safe working practice in accordance with H&S Legislation, BNSS procedures, and recommended best practice for themselves and any staff and volunteers for which they are responsible.

6.6 HR

BNSS seeks to ensure compliance with employment law and keep up-to-date with relevant changes in legislation.

6.7 Policies and position statements

- Accreditation standard requirements (2012).
- BNSS risk-register (2014).
- Cataloguing procedures (Chapman, 2012).
- Curatorial procedures (Chapman, 2012).
- Financial Policy (Duggan, 2014)
- Fire procedure (Jolliffe, 2014)
- Health and safety policy (Chapman 2014)
- Loans in procedure (Chapman, 2012).
- Loans out (Chapman, 2012).
- Location and movement control (Chapman 2012).
- Object entry procedure (Chapman 2012).
- Object exit procedure (Chapman 2012).
- Retrospective documentation (Chapman 2012).

6.8 BNSS contacts and point people

There are many organisations working locally and further afield that are of relevance to BNSS; including NGOs, Local Authorities, schools, Higher Education Institutes and commercial enterprises. BNSS is already working closely with some of these organisations, and we should be looking for further opportunities for collaboration wherever appropriate such as The Arts University of Bournemouth, Rotary West Cliffe.

A list of identified organisations with named BNSS contacts can be found in Appendix 1 – any volunteers that are willing to help forge links with other organisations are encouraged to let the Trustees know.

7. Current initiatives

7.1 *Museum accreditation*

Accreditation was granted in October 2015 by the Arts Council England after review of the application and the visit of an assessor to check the documentation and the museum, support was provided by the museum development team. Accreditation is reviewed by the Arts Council every three years to ensure that we are achieving our Forward Plan, maintaining the use of the SPECTRUM procedures (currently under review by the Collections Trust)' and have completed the 'Areas for Improvement' proposed by our assessor. The latter are seventeen areas in ten of the main topics making up the accreditation standard. Of these four have been completed and the museum development team are working to complete the others. The most onerous is the completion of the cataloguing, numbering and accessioning the collections.

7.2 Finance

Replace a Support expired Account PC package currently running BNSS Finances with Cloud based system.

This enables off-site backup of BNSS, real time bank feeds to remove human data entry error, streamlines recurrent tasks eg manual entry of direct debit membership payments every month, and real time collaboration eg with BNSS Auditor. Complete June 30 2017

Review of advantages to BNSS of implementation of credit card reader facility, connected directly to BNSS current account, to improve membership and shop payment options. Subject to review, implement by September 30 2017.

8. Objectives tables

The following tables list the three-year objectives and actions that have been identified as necessary in order to achieve our targets for the eleven core areas (see section 5.2). Wherever possible all objectives and actions are “SMART” – specific, measurable, achievable, realistic, and time-limited – so that we can assess our progress over the coming few years. Given that time and resources are limited, actions have been prioritised, and, some estimation of costs has been included to assist in budgeting.

In the process of developing this strategic plan, volunteers have come forward to help with its delivery, so some objectives/actions have a nominated lead, who is primarily (but not exclusively) responsible for overseeing its delivery.

Many objectives/actions do not yet have a nominated lead, for many of which there is an urgent need for those gaps to be filled.

Any offers to contribute and help spread the workload would be gratefully received.

Target 1: Membership growth. Achieve an annual growth of 25% in the number of paying members.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
1.1	So that potential members better understand BNSS, formulate a clear description of BNSS brand (character), and communicate it via the completed Strategic Plan and through publishable summaries.	Trustees	Input from members.	3.2, 3.4	Med	ongoing
1.2	Review and simplify membership categories to reflect the society's target audiences.	Trustees	Input from members.		Low	ongoing
1.3	Complete development of a single central membership and contacts database.	James Fradgley	Time for someone to input data.	Achieved	✓	ongoing
1.4	Implement an easy membership payment and renewal system to attract and retain members.	GD, JF	Financial setup costs and ongoing transaction fees for Direct Debit	Achieved	✓	ongoing
1.5	Consider options for offering a range of membership benefits packages for different membership types (cf Gift Aid implications).	Membership team*	Input from Trustees and members			2017
1.6	Produce easy to complete membership forms with description of BNSS, benefits, and easy pay system.	BL, GD, JF	Printing	5.5	✓	Review Annually
1.7	Develop systems for engaging non-members, e.g. at events and lectures, including the identification of people responsible.	Trustees, Section Chairs	Engagement by event organisers and volunteers. Recruitment company?	2.2, 7.2	ongoing	ongoing
1.8	Identify and forge partnerships with key groups and organisations to increase BNSS memberships.	Trustees	Input from officers and members		ongoing	2018
1.9	Develop and implement a strategy for recruiting and retaining members and widening the membership demographic e.g. incentives for members to "recommend a friend" and events specific to different target audiences.	Membership team*		3.2, 3.10, 3.27, 3.29, 4.1, 4.2, 6.8		2018
1.10	Review membership rates and amend as necessary.	Trustees	Input from membership team	2.1, 10.6		Annually
1.11	Review and update the material welcoming new members when they join.					2018

Target 2: Fundraising. Increase gross income from fundraising (excluding memberships) by 25% per annum.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
2.1	Raise sufficient funds each year to meet budget requirements to conduct the work agreed in the Strategic Plan and ongoing maintenance/upkeep commitments. Grant applications and considered use of reserves.	Fundraising team*		1.11, 3.15, 4.5, 6.11, 8.1, 10.2, 10.3, 10.9, 10.10, 11.6		Annually
2.2	Increase the income from events, talks and field trips by at least 10% per annum – encourage everyone that attends to make a donation.	Programme committee	Volunteer “meeters and greeters”	1.8, 7.2, 7.3, 7.7		Annually
2.3	Find and develop new funding opportunities from grant-making trusts and foundations by at least £20,000 per annum.	Fundraising team*	Bid-writing skills	6.4, 8.6		Ongoing
2.4	Develop a legacy income programme to which members can sign up to..			10.7		Ongoing
2.5	Grow the income and support derived from businesses and organisations so that at least 2 companies per annum can be considered as BNSS supporters e.g. through corporate membership.	Trustees		To Complete		Ongoing
2.6	Develop a major donor programme.					2017
2.7	Increase income through room hire/letting of parking spaces annually.			8.3		Ongoing
2.8	Review hall hire/parking rates annually to ensure that they are competitive and create a positive income.	Trustees		10.2, 10.11		Annually
2.9	Implement (and promote) easy-to-use systems for online and text donations.			7.3		Ongoing

Target 3: Marketing and communications. Develop an attractive and consistent brand for BNSS that is widely recognised in the east of Dorset.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
3.1	Maintain the post of Publicity Officer.	Trustees		achieved	✓	Ongoing
3.2	Develop and implement a clear and achievable marketing/publicity plan with annual budget.	Trustees		1.1, 1.6, 10.2, 11.6	✓	2018
3.3	Actively seek out key skills volunteers to be responsible for (such roles as): <ul style="list-style-type: none"> • Newsletter • Proceedings • Website and social media updates • Noticeboards/posters/flyers 		Volunteers			Ongoing
3.4	Consider redesign of BNSS logo. It needs to be distinctive, attractive and modern whilst reflecting the Society's mission statement and heritage.		Input from Trustees and members. Financial cost of printing new branded materials.			2016
WEBSITE AND SOCIAL MEDIA						
3.5	Provide a modern, attractive, and easy-to-navigate website that closely reflects BNSS mission statement, character and heritage.		Financial			2016
3.6	Ensure that information on the website is kept up-to-date.		Publicity Officer		✓	Ongoing
3.7	Review the website structure and content management as necessary to ensure that it is fit for purpose including Google analytics.					Annually
3.8	Investigate further use of social media management software (e.g. Hootsuite / Yoono) to keep BNSS Facebook and Twitter feeds up-to-date.					Review 2017
3.9	Guard against loss of key skills volunteers by training others to update the website and social media accounts.	BL		5.2, 5.5		2017
No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline

		are needed)				
NEWSLETTER AND PROCEEDINGS						
3.10	Produce a consistently high quality quarterly newsletter that is interesting and appealing to all members, and is an attractive 'selling point' to potential new members.			1.10, 8.5		Ongoing
3.11	Investigate options and establish costs for providing a hard copy, colour (or part) newsletter to all members. Determine whether this is a viable option for the BNSS financially.		Financial costs. Potential sponsors?			2016
3.12	Produce annual Proceedings that is interesting and appealing to all members, and is an attractive 'selling point' to potential new members.		Proceedings editor needed			Annually
3.13	Review the current Proceedings layout and content to find ways to widen its appeal.					Annually
3.14	Review the current printing costs of Proceedings and consider options for providing a colour copy to all members in 2015.			10.2		2016
3.15	Review the current Proceedings mailing operation and postage costs to ensure efficient use of time and funds.			2.1		2016
PROGRAMME						
3.16	Provide a consistently high quality printed and online Programme that is interesting and appealing to target audiences, and is also an attractive 'selling point' to potential new members.					Ongoing
3.17	Provide a hard copy of the Programme to all members that wish to receive one.					Ongoing
3.18	Review the current hard copy and online Programme content and make improvements if needed.					Ongoing
3.19	Review the current costs of hard copy Programme printing.			10.2		Ongoing
3.20	Review the current newsletter and Programme mailing operation and postage costs to ensure efficient use of time and funds.					Ongoing

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
NOTICEBOARDS						
3.21	Maintain up-to-date, informative and attractive notice boards both within and at the front of the BNSS building.					Ongoing
3.22	Review current internal BNSS notice board updates/maintenance operations, and make changes if needed.					Ongoing
3.23	Review the current locations and sizes of internal BNSS noticeboards. Get quotes for new noticeboards if deemed necessary.	Trustees				2016
3.24	Assess and address current external notice board maintenance needs.	Publicity Officer				2016
3.25	Investigate options for a new external notice board design and advertising materials with quotes/grant research.					2016
PUBLICITY						
3.26	Review the current programme flyer design and printing options.			10.2		Ongoing
3.27	Develop a new "about BNSS" information leaflet.					Ongoing
3.28	Produce a "history of BNSS" information leaflet.	JC				2016
3.29	Ensure that BNSS publicity material (including public programme of events, and newsletter where applicable) is displayed at, or sent to, relevant groups including: <ul style="list-style-type: none"> • Local newspapers and radio stations • Local schools, colleges and universities • Local libraries • Local interest groups of a similar nature 			4.1		Ongoing

Target 4: Engaging local communities. Increase the number and age-range of people engaging in BNSS activities.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
4.1	Continue to offer “Young Explorers” junior section with a section lead, calendar of events, list of suitable activities and risk assessments.	SL		1.10, 3.29	✓	Ongoing
4.2	Research reasons why people (both members and non-members) visit BNSS already, and what else they would like to see on offer.	SL		1.10, 6.8	✓	Ongoing
4.3	Identify groups/organisations within the local community to whom BNSS may be of benefit (e.g. schools, youth organisations, adult learning).	SL		6.11		Ongoing
4.4	Delegate identified organisations to team members to make contact, improve awareness of BNSS and identify any specific needs.					Ongoing
4.5	Build capacity (funding and people) in order to meet the identified needs and carry forward Young Explorers.	TRUSTEES	External funding, to support volunteers and/or staff	2.1	✓	2015
4.6	Develop priorities based on the findings of 4.2 and 4.4.	SL				Ongoing
4.7	Develop general or personalised programmes for the identified organisations in line with their needs and what the BNSS can offer.	SL		6.10, 6.11		2017
4.8	Review annually in consultation with Trustees to ensure a suitable and relevant programme that continues to fall within the resources and priorities of BNSS.	SL				Annually

Target 5: Staff, volunteering & participation. Ensure sufficient capacity for all roles and responsibilities within BNSS.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
5.1	Write job descriptions for all BNSS roles and responsibilities, for which there is not currently one written, including: <ul style="list-style-type: none"> • Doorkeepers, • Tea servers • Administrative assistant • Publicity officer • Hall hire manager • Sales assistant • Projectionist • Schools/education coordinator • Manual skills for museum conservation, cleaning etc. 	Trustees		6.9, 6.11, 11.11		2017 ONGOING
5.2	Appoint volunteer coordinator and actively seek to fill all of the above roles – particularly publicity officer and hall hire manager.	Volunteer coordinator*	Volunteers	3.9, 6.9		2016
5.3	Consider paying for services if volunteers do not come forward to fill essential roles.	Trustees	Financial costs	10.4		2016
5.4	Develop a standard volunteer agreement.			11.11		2016
5.5	Encourage volunteers with a wide range of skills & talents to get involved with running the Museum			1.7, 3.9		2017

Target 6: Museum development. Achieve accredited museum status and open as a charging museum.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
6.1	Complete database cataloguing of accessioned collections and 50% of non-accessioned.	RC	MODES catalogue system and 2 laptops ~£3000			Ongoing
6.2	Achieve and maintain accreditation	RC/ Trustees	Complete paperwork			Achieved Review 2018
6.3	Maintain SPECTRUM procedures.	Curator & Assistant curators	Accession register, Forms ~£500			Review 2019
6.4	Use Accreditation status to apply for grants to implement objectives.	Fundraising Team*		2.3		Ongoing
6.5	Improve storage facilities.		~£200			Ongoing
6.6	Enhance the appearance of the building, museum and exhibits to match its heritage and future.	BL	Volunteers/ financial	8		Ongoing
6.7	Implement programme of conservation of building and collections.	BL/JM	Team £500	8		Started Ongoing
6.8	Develop a system for the staffing of regular museum openings.	Volunteer Coordinator*	Volunteers	5.1, 5.2		Holiday opening achieved Ongoing
6.9	Research ways in which museum visits can be linked to the National Curriculum.	SL				Young Explorers
6.10	Develop capacity and interest from schools' to make use of museum resources – consider appointing a Schools Officer.	SL	Volunteers/ financial	2.1, 4.3, 4.7, 5.1		2018

Target 7: Lectures, field visits and activities. Maintain the number and quality of lectures, field visits and activities while attracting a broader demographic.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
7.1	Whilst maintaining a focus on the current target audience for walks and talks, at least one event per month will be attractive/ accessible to a wider audience by subject or timing (evenings/weekends).	Programme Committee			✓	Ongoing
7.2	At every BNSS lecture and field visit non-members will be encouraged join and offered a membership form.		Volunteers to identify/ greet non-members	1.8, 2.2		Ongoing
7.3	Everyone attending BNSS events will be encouraged to give a donation to contribute to the costs of running such events.		Volunteers to collect donations and pass on to the Treasurer.	2.9		Ongoing
7.4	Investigate options for upgrading the audio/visual equipment used in lectures (including IT hardware and software), to ensure that facilities are fit for purpose and meet modern expectations.		Financial		✓	2016
7.5	Investigate demand for setting up a photographic group.		Volunteer to lead			2016
7.6	Consider setting up a marine section.		Volunteer to lead			2016
7.7	Ensure that at least one high profile speaker presents at a ticketed event each year.	Programme Committee	Financial costs of speaker and publicity	2.2	✓	Annually
7.8	Ensure that at least four field trips per year are within the Poole, Bournemouth or east Dorset area.	Programme Committee			✓	Annually from 2014
7.9	Keep a record of species recorded on all field trips and send the details to Dorset Environmental Records Centre.	Field trip leaders	Volunteer on each fieldtrip			2016
7.10	Uphold high standards of H&S awareness/preparedness at all events – e.g. risk assessments, first aid kits, what to do in event of fire etc.			9.4, 9.5, 9.10		Ongoing

Target 8: Maintenance. Ensure the building, garden and facilities are fit for purpose.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
8.1	Put together a 5 year maintenance plan as required for a Grade 2 listed building situated in a coastal environment.	AJ	Financial costs of implementation	2.1	✓	2016
8.2	Implement a reporting system for members/officers/trustees to flag up facilities requiring attention.	AJ				Ongoing
8.3	Assess the BNSS facilities' fitness for purpose.	AJ	Input from members and trustees	2.7	✓	Ongoing
8.4	Produce a development plan to prioritise and address issues identified by 8.3.	AJ	Input from Trustees Financial costs of implementation			Ongoing
8.5	Communicate project progress and remedial activities in response to 8.2 to members quarterly via the newsletter.	AJ		3.10		Ongoing
8.6	Recommend capital development projects to Fundraiser teams e.g. Lantern Roof and upgrading the building where 8.3 identifies elements as not fit for purpose.	AJ		2.1	✓	Ongoing
8.7	Engage with external regulating bodies e.g. Conservation Officer at Local Authority level to ensure compliance with Listed Building requirements at lowest cost.	AJ	Time for maintaining a dialogue			Ongoing
8.8	Undertake survey of the caretaker's flat.	AJ				2016
8.9	Take action if required by results of 8.8.	AJ	Financial costs of implementation			2018
8.10	Manage the garden in an environmentally-friendly way to improve its value for wildlife.	JM	Awareness of garden volunteers		✓	Ongoing

Target 9: Health & safety. Ensure legal compliance and that BNSS's risk register is maintained and implemented.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
9.1	Keep abreast of latest H&S regulations and their applicability to BNSS, ensuring compliance.	AJ			✓	Ongoing
9.2	Review current BNSS Risk Register annually, including Fire Risk Register, and check against best practice recommendations. Benchmark against equivalent sized museums, galleries etc. to see what we can learn. Seek advice from external consultants as necessary.	AJ	Financial costs of consultancy services			Ongoing
9.3	Revisit action 9.1 as required by implementation of other sections of this plan e.g. re change of use of building to include an accredited museum.	AJ	Input from other officers			Ongoing
9.4	Ensure that the building meets the necessary standards for visitor safety.	AJ	Financial	7.10	✓	Ongoing
9.5	Ensure risk assessments are completed for all activities internal and external.	AJ	Input from field trip leaders and other events organisers	7.10		Ongoing
9.6	An annual inspection of the whole property is carried out.	AJ				Annually
9.7	Ensure fire safety compliance, with drills and an annual inspection of equipment.	AJ				Ongoing
9.8	Ensure that Health & Safety is a standing item on the agenda at every Trustee meeting.	AJ				Ongoing
9.9	Ensure wherever possible the house is made fit to meet the Disability Discrimination Act regulations.	AJ	Financial			Ongoing
9.10	Ensure that details of procedures to be followed in the event of a fire are displayed in prominent locations throughout the building.	PW		7.10		Ongoing

Target 10: Financial management and planning. Develop and implement systems to monitor management accounts and adhere to annual budget.

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
10.1	Document and formally adopt a BNSS Financial Policy.	Trustees		11.5, 11.6	✓	Ongoing
10.2	Implement a more formal budget process.	Treasurer	Input from Trustees	2.1, 2.8, 3.2, 3.14, 3.19		Ongoing
10.3	Recommend projects to Fundraising group as identified by the budgeting process.	Treasurer	Input from Trustees	2.1		Ongoing
10.4	Develop contingency plans for ensuring smooth running of the society e.g. shadowing scheme in case of loss of key officers.	Trustees	Possible financial costs	5.3		Ongoing
10.5	Ensure independent inspection of BNSS accounts takes place annually, in line with Charity Commission recommendations.	Treasurer				Annually
10.6	Review Direct Debit and other payment plans to encourage new and long term BNSS membership.	Treasurer and Membership Secretary		1.11		Annually
10.7	Research options for promoting donations to BNSS via bequests and legacies and implement as deemed appropriate.			2.4		Ongoing
10.8	Research options to replace the current BNSS Accounts and Reporting System with a supported package that better promotes appropriate internal controls, transparency and accountability e.g. Moneydance.	Treasurer				See Section 7.2 Current Initiatives, Finance
10.9	Develop and implement a business plan.			2.1	✓	Ongoing
10.10	Take a more targeted approach to the selection and purchase of stock for sale at BNSS events, including BNSS-branded items.			2.1		Ongoing
10.11	Keep track of utilities, salaries etc. in terms of how much it costs BNSS to open the building for room hire.	Trustees		2.8	✓	Annually

Target 11: Governance. Develop and implement best practice management and governance systems (including operating in an ethical and environmentally-friendly manner).

No.	Objective / action	Lead (if blank or asterisked volunteers are needed)	Resources	Related objectives in other sections	Priority ?	Timescale /deadline
11.1	Develop a Trustees' pack to make sure all current and new Trustees are aware of and understand: <ul style="list-style-type: none"> their roles and responsibilities, as set out in the BNSS Constitution and Rules their legal duties arising from the Charities Act 2011 Charity Commission requirements The law relating to employment, health and safety, data protection, listed building status and any other legislation relevant to the activities of BNSS. 	CC			✓	2016
11.2	Produce a calendar for the annual Trustee diary to review specific items, e.g. insurance, CPP, annual report, annual accounts, AGM, complaints policy.	CC				Ongoing
11.3	Ensure an adequate number of Trustees are nominated and elected and that they are recruited in a free and transparent process.	Secretary				Annually
11.4	Ensure all Trustees are adequately informed with the right skills by the formulation of a Trustee training plan, with annual review.	Chair of Trustees				Annually
11.5	Write and adopt a policy for reimbursing volunteers for relevant training that is of benefit to BNSS.	Trustees	Financial	10.1		Ongoing
11.6	Prepare an annual budget for running the society: lectures, admin, house and maintenance, publicity etc.	Treasurer	Input from Officers	2.1, 3.2, 10.1		Annually
11.7	Define the Trustee period of service and limits to re-election.					Ongoing
11.8	Document the organisational structure of BNSS.	CC				Ongoing
11.9	Publicise the existence of this Strategic plan and adopt a delivery plan with mechanisms for monitoring progress.	CC	Volunteers to help deliver		✓	Ongoing
11.10	Formalise a process for the Trustee Board to receive reports from lead officers, volunteers, visitors and members.					Ongoing
11.11	Produce a handbook for staff/volunteers/members incorporating Constitution and Rules, H&S, Fire procedures, CPP, history of Society etc.	Secretary		5.1, 5.4	✓	Ongoing
11.12	Encourage members to get more involved with the running of the Society via the Assembly.					Ongoing
11.13	Consider options for switching to CIO and monitor	Trustees			✓	Ongoing

9. References

This strategic plan has drawn heavily on the thinking of many within the Society. The following are some of the documents that have fed into this plan or will be used to design the practical steps needed.

Anon. (2006). BNSS Constitution. 8pp.

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Cripps, S.J. et al. (2012). BNSS risk register 2013 – 2nd draft. 6pp.

Cripps, S.J. (in press). Planning the future of the BNSS. 2pp.

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Limburn, B. (2013). My vision for BNSS. 6pp.

Limburn, S. (2013). BNSS junior section. 4pp.

Thornton, M. (2013). Ideal view of development of BNSS. 3pp.

Thornton, M (2013). Results of strategy meeting 13 April 2013. 2pp.

10. Appendices

10.1 Appendix 1: BNSS contacts and point people

Person / organisation	Type	BNSS contact(s)
Amphibian and Reptile Conservation	NGO	Ben Limburn
AONB - Cranborne Chase	Local Authority	
AONB - Dorset	Local Authority	
Arts Festival (Bournemouth Borough Council)	Local Authority	Mary Thornton
Arts University Bournemouth	Higher Education	Mary Thornton
Association of Independent Museums	NGO/Grant body	Ray Chapman
Borough of Poole	Local Authority	Anne Jolliffe
Bournemouth Borough Council	Local Authority	John Cresswell, Anne Jolliffe, Mary Thornton
Bournemouth, Christchurch and Poole Historical Association	Membership society	Mike Downing
Bournemouth and Poole College	Higher Education	Steve Limburn
Bournemouth University	Higher Education / Research	Mary Thornton,
Butterfly Conservation	NGO	Mark Spencer
Christadelphian Church	Religious	
Dorset Bat Group	Membership society	
Dorset Bird Club	Membership society	Ian Julian
Dorset Business Forum	Commercial	Anne Jolliffe
Dorset Coast Forum	NGO	Mary Thornton
Dorset County Council / LAA	Statutory Authority	Rod Cooper
Dorset Geologists' Association	Membership society	Ray Chapman
Dorset High Sheriff	VIP	Rod Cooper
Dorset Local Enterprise Partnership	Commercial/Local Authority	Rod Cooper
Dorset Local Nature Partnership	Partnership	Mary Thornton
Dorset Mammal Group	Membership society	
Dorset Museums Association	NGO	Renate Haupt
Dorset Wildlife Trust	NGO	
Grasslands Trust	NGO	
Hengistbury Head Visitors Centre	Natural history and archaeology	Renate Haupt, John Cresswell
Heritage Lottery Fund	Grant body	Colin Lord
LEA and schools	Education	Steve Limburn
MPs	Government	
National Trust	NGO	
RSPB	NGO	Ian Julian
Russell Coates Museum	Museum	Renate Haupt
Southampton University	Higher Education / Research	
Wessex Astronomical Society	Membership society	James Fradgley

10.2 Appendix 2: Key to leads identified in objectives tables

AJ	Anne Jolliffe
BL	Ben Limburn
GD	Gerry Duggan
JC	John Cresswell
JF	James Fradgley
JM	Jonathan McGowan
RC	Ray Chapman
CL	Colin Lord
RC	Rod Cooper

Reviewed: June 2017

Authorised: Chairman of Trustees

Name: Rod Cooper

Signature:

Next Review: June 2018

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