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# 1. Purpose and vision

## Who we are

IWM is a global authority on conflict and its impact, from the First World War to the present day, focusing on Britain, its former Empire and Commonwealth.

## What we do

We record and showcase people's experiences of modern conflict. Some of those experiences paint a picture of everyday life in wartime; others give us a glimpse of something exceptional. All of them help us to explore the causes of war and its impact on people's lives. We draw on the experiences of people from all walks of life and try to reflect the total nature of war.

## How we do it

We try to tell every story in as vivid a way as possible, creating powerful experiences that engage visitors of all ages with the issues of war and conflict. Our collections are unique and constantly evolving and we try to exhibit them in as relevant a way as possible to contemporary audiences.

## Where we do it

IWM engages audiences from across the world both physically and virtually, through our website at [iwm.org.uk](http://iwm.org.uk), through our digital channels and innovation in digital resources and across our five branches: IWM London, IWM North, IWM Duxford, Churchill War Rooms and HMS *Belfast*.

## What we are trying to achieve

Our vision is to be a leader in developing and communicating a deeper understanding of the causes, course and consequences of war.

## What we stand for

As an organisation we are guided by four important values. We aim to be:

- § **Courageous:** we're confident and have the courage to challenge the established wisdom, championing debate and innovative approaches
- § **Authoritative:** our deep and dynamic knowledge of our rich collections make us the first point of call on the history of modern conflict, and sets standards of excellence in everything we do
- § **Relevant:** we strive to make everything we do relevant to contemporary society, while maintaining a balanced and impartial point of view
- § **Empathetic:** we're sensitive to people's emotions, respecting different points of view and the deep significance of our collections

## 2. Review

### Our audiences

During the past year we have welcomed over 1.9 million visitors to our branches. In May 2012, HMS *Belfast* held a special 'Family Weekender', with visitors joining us to celebrate the reopening of the ship following the collapse of the gangway at the end of the previous year. In the same month, the new Churchill War Rooms visitor entrance opened giving the site heightened street presence and improving our visitor welcome. As predicted, the 2012 London Olympics attracted a different visitor profile to the capital and although this affected our visitor numbers, we have remained on budget. At IWM Duxford, a very successful programme of air shows saw record-breaking numbers attending the Jubilee Air Show in May. Overall visitor satisfaction remained exceptionally high, with the proportion of visitors likely to recommend a visit at 99 per cent. We have continued to provide high quality and varied on-site learning programmes, with over 450,000 on-site learners visiting our branches over the last year.

Online visitor numbers have grown hugely since the launch of our new website in late 2011 and more than 4 million people visited our website last year. Over 500,000 more collection items are now accessible online and a wider range of services, content and social media channels means that visitors are staying on our website for longer and engaging with our collections more meaningfully. Digital multimedia is now an integral part of our public spaces too, with a ground-breaking social media project installed in the galleries at IWM London and IWM North.

### Our programmes

At IWM London, *A Family In Wartime* opened in April 2012, a semi-permanent exhibition that engages audiences of all ages with the story of how ordinary people braved the challenges of life at home during the Second World War. *Cecil Beaton: Theatre of War* generated much positive editorial coverage and reviews over its run from September 2012 to January 2013. *War Story: Serving in Afghanistan* at IWM London was refreshed in July 2012 and owing to its popularity with visitors, extended until the end of December 2012. The display was accompanied by a 'talk to a soldier' programme, where serving members of the Armed Forces involved in the project interact with visitors.

At IWM North, *Once upon a Wartime* ran from February to September 2012, accompanied by a popular programme of family activities. *10@10: A Decade of Surprising Stories* opened on 23 June, marking IWM North's tenth anniversary. The *Saving Lives: Frontline Medicine in a Century of Conflict* exhibition, which opened in October, explores the unique relationship between war and medicine.

Finally, as part of our contribution to the London 2012 Cultural Olympiad, IWM's learning project, *Build The Truce*, examined contemporary conflict cycles and their resolution, using the concept of 'truce' as a starting point. The project included a display at IWM London and a Big Picture Show dedicated to the theme at IWM North. It drew to a close in September 2012 with a programme to mark the International Day of Peace.

### Money matters

We have continued to look at how we can build our financial sustainability and IWM's *Fit for the Future* programme of long-term strategic change is informed by this. We are building financial returns and carefully managing fixed costs to ensure that we maximise our financial flexibility. Of our total operating income, almost half is now self-generated. Net profit from commercial income continues to grow, reaching a new high of 34 per cent (£3.2 million) in 2011–12. We have set ambitious targets to continue this growth. Alongside areas of particular success, including our retail activity across all branches where we have achieved record-breaking profits on lower turnover, we are also driving new areas of activity,

for example, brand licensing. Over the coming year will launch a Commercial Strategy to consolidate and build on our successes to date.

## **First World War Centenary**

The Centenary of the First World War in 2014 presents an enormous opportunity for IWM. At the heart of our plans is the Regeneration: First World War Centenary Project, the first phase of our long-term masterplan to transform IWM London. Scheduled for completion in June 2014, this project will deliver new First World War Galleries, refreshed atrium displays and improved visitor facilities including new café and retail spaces. It will mean a transformed visitor experience for more than 1.3 million visitors to the branch every year.

Over the past year we have reached several major milestones. To date £30.5 million of our £35 million fundraising target has been pledged, including a £4.5 million Heritage Lottery Fund (HLF) grant and £5 million funding announced by the Prime Minister in October 2012. We were granted listed building consent and planning permission in May 2012 and construction commenced in January 2013. At this time the branch closed for a six-month period to accommodate the most disruptive construction works. In the lead-up to this, we ran a communications campaign around Transforming London plans to raise awareness of the temporary closure and generate a buzz about our future plans.

We have also continued to lead and develop the national and international First World War Centenary Partnership programme which now has over 700 member organisations, creating a professional network with access to pre-prepared digital collections assets, historical information and a range of toolkits authored by IWM.

Those organisations that join the First World War Centenary partnership have access to a wealth of expertise and resources, including 100 free Centenary resources from IWM collections and a professional network of relevant organisations. IWM has developed a specially created Centenary logo, for use on member organisations' own projects and resources. It is IWM's ambition that all Centenary-related cultural and educational providers will join the partnership and use this logo to promote the Centenary and the activities taking place across the globe to commemorate it.

IWM will collate all Centenary-related events developed by members and promote these globally through a publicly available events calendar on 1914.org (a site to be further developed in 2013). Through holding national commemorations, the work of the Centenary Partnership in developing arts and cultural programmes across the country, opening new First World War Galleries at IWM London, creating innovative digital platforms and engaging with the youth of today through the development of educational initiatives, we can create a lasting legacy from this landmark anniversary.

### 3. Horizon scanning

In developing this Corporate Plan, we have looked at existing and emerging trends that may impact on us. These include:

- § Challenging economic conditions – this will make trading activity more difficult. Sluggish wage growth and households under considerable financial pressure are factors likely to affect spending decisions of our visitors and customers
- § Fluctuating tourism patterns – which will continue to be influenced by the weakening of the Euro. Favourable exchange rates may impact our domestic visitors, whilst we are likely to see fewer visitors from traditional European markets. In addition, slow economic recovery in the US is a potential risk, particularly for Churchill War Rooms core audience
- § Political flux – a general election falls within this planning period (2015). We have built our Corporate Plan on the basis of reduced grant in aid (down by one per cent in 2013–14, and a further two per cent reduction in 2014–15) but managing any further cuts will be a major challenge; likely to impact the level of public services and programming we deliver
- § Operational imperatives – we must continue to effectively manage, and in the medium to long-term reduce, our fixed cost base (this includes salaries, buildings and utility costs), especially so that we can protect our public programming and ‘frontline services’
- § Changing audiences and rapidly evolving audience expectations – digital media and social networking will continue to shape the way we live. Word of mouth through digital channels is increasingly important to build trust and generate engagement. We need to cater for a range of audience types using different media
- § An ageing population – this will mean that there is a larger difference between the needs of this core and growing audience to those of a more digitally savvy younger audience, which our public programme needs to be responsive to
- § Major anniversary events – the centenary of the First World War gives us an enormous opportunity to achieve a step-change in our profile, reputation and brand. It provides us with a platform to position ourselves as the global authority on conflict and its impact. Beyond this, important Second World War anniversaries will bring opportunities to further our purpose and vision.

## 4. Forward plan

The plan is based on our five strategic objectives to be:

- § **Audience-centred** through our temporary exhibitions, gallery spaces, learning programmes, events, services, digital content, publications and products. We will maintain exceptionally high levels of customer satisfaction;
- § **Relevant** to our audiences, ensuring that our activities are designed to have long-term impact;
- § **Continuously evolving** in order to deliver excellence, bringing audiences and stakeholders with us;
- § **High profile**, so that we maximise our impact on a local, regional, national and international scale; and
- § **Efficient and effective**, delivering the best possible value for money by continuing to focus on core, high-impact activity

It highlights the projects and programmes that are in place to lead us towards the achievement of our long-term strategic aims. We have developed a plan that provides £19 million in investment towards our highest organisational priorities across 2013–16. Plans to mark the centenary of the First World War and in particular, the Regeneration: First World War Centenary Project, remain our highest organisational priority. The level of resource that we are investing in all of our centenary plans reflects our efforts to maximise the opportunities presented by this major anniversary.

We are also modernising our ways of working, with funding in place to support our shift from analogue to digital (both through specific project investment and by ensuring that our resources and skills are in the right place). Capital investment in the public offer at our branches includes the redevelopment of the American Air Museum, ongoing improvements on HMS *Belfast* and the upgrading of the foyer and visitor welcome area at IWM North. A significant proportion of priority investment is also channelled towards our integrated public programming, with exciting new exhibitions planned at both IWM London and IWM North.

Our income targets are prudent and realistic. Most importantly, they also reflect the impact of our Commercial Strategy, which will be finalised over the coming year and will start to have a direct impact on net profit and income levels across all of our activities.

### 4.1 Our long-term vision

By the end of this Corporate Plan period, in 2016, we will have started the delivery of a high quality and well-resourced First World War centenary offer across IWM channels, achieved a significant increase in commercial returns, made a real shift to digital delivery and engagement, and built and sustained a motivated and flexible workforce. Our brand values will be fully embedded across the organisation and our profile will have been significantly enhanced.

Looking to 2020, we are aiming to:

- § Cement our profile as an influential, internationally renowned museum
- § Build and engage loyal audiences and supporters, including significant philanthropic support
- § Offer a dynamic and responsive public offer across multiple channels

- § Implement a Commercial Strategy that truly maximises our assets
- § Achieve higher income (and higher net profit in particular) and lower fixed costs
- § Support a well-resourced capital investment strategy for our estates and infrastructure
- § Be accountable for a collection that is fully accessible

This Corporate Plan lays the foundations for this major long-term strategic change. However, IWM faces considerable challenges as well as major opportunities over the next decade. The way in which we respond to these factors has been framed around our ten strategic risks, outlined below:

## 4.2 Risk management

Strategic Risk	Response
1. Serious deterioration of financial resources	Our Corporate Plan resources our highest-priority activity. Commercial plans focus on delivering excellent customer service and increasing net profit. However, the overall rate at which we are able to build financial sustainability through business change remains an area of risk.
2. Audience stagnates and declines	IWM's Audience Development Strategy ensures that our public programme is designed to appeal to key target markets. We will continue to build our brand through strategic partnerships, consistent messaging and a strong visitor offer.
3. Inefficient and outmoded infrastructure	This risk results from a legacy of underinvestment across our estate. Our capital redevelopment projects will seek to address this risk over the coming years. Investment in Information and Communication Technology (ICT) systems to support our business, website, multimedia activity and the storage of digitised assets will continue to drive the modernisation of our operation.
4. Loss or damage to our collections and other assets	Ongoing documentation, digitisation and upgrades to our fire and security systems seek to address this risk. The IWM Duxford Northside project, which is phased over the Corporate Plan, will consolidate and improve our collections storage facilities.
5. Collections and scholarly expertise not developed	Achieving full Independent Research Organisation status has increased future funding opportunities and the scope of our Collaborative Doctoral Awards programme. IWM's research output helps to build our reputation and to achieve a high-quality impact for audiences.
6. Serious harm to people	IWM's Health and Safety training programme and clear policies provide assurance across all of our operational plans and capital projects.
7. Staff motivation and productivity low	Over the Corporate Plan period, we are looking at improving our ways of working, reducing unnecessary bureaucracy and developing our workforce. We are

	using the results of our staff engagement survey in 2012 as the basis for building much of this positive change.
8. Breach of laws, regulations and standards	Work will continue to ensure compliance in all relevant areas, with the Senior Management Team and Board of Trustees regularly reviewing policies.
9. Significant business interruption	Business continuity planning is supported by ongoing investment in ICT and fire and security systems. We are developing a clear, long-term strategy to manage our buildings and estates and this is informed by the extensive masterplanning we have undertaken over the past five years. However, the allocation of minimal funds to support our most critical preventive maintenance work presents a significant organisational risk.
10. Regeneration: First World War Centenary Project opportunity not fully exploited	The redevelopment of IWM London presents an enormous opportunity. We will secure the remaining £4.5 million in funding towards phase one of masterplan, and will continue to fundraise, working closely with the IWM Foundation, to support future phases of our transformational plans for change.

### 4.3 First World War Centenary

The centenary of the First World War will be a truly seminal moment in world history, and IWM will be a national and international focus, for activity to mark this momentous anniversary. We will open ground-breaking new galleries that allow our visitors to connect to the personal stories of those that experienced the First World War first hand. We will help a wide range of stakeholders find their personal connection to the war, for example, through their family history, their community or where they live. We will deliver an innovative Centenary Programme of events and activities, and at IWM London, we will be able to offer our visitors a vastly improved experience in a transformed public space. At the same time, by 2014, we will have augmented our capacity to generate commercial income by a margin, laying the foundations for us to remain financially sustainable and fit for the future.

Alongside this, the Centenary Programme (whose membership will grow to over 900 partner organisations) will be a great catalyst for digital development and as such, will be supported by a digital programme which aims to provide rich online content and digital experiences based on our collections, our expertise and the new First World War Galleries.

Drawing on the principles of crowd-sourcing, IWM's Lives of the First World War project will invite users across the world to become citizen historians, making connections between IWM's collections, museums and archives, family collections and other data sources. This will enable them to build unique personal profiles online, honouring each of the millions of men and women who made life-changing contributions during 1914 to 1918. Our ambition is to create the largest online database of its kind in the world, with a useable product available by the autumn of 2013. We will also run a programme of family history activities for the public to engage with by participating in grass-roots events that explore the First World War Lives of their local community.

Our Centenary Programme has been developed with core target audiences in mind. Key to this is engaging children and young people with the First World War and its relevance today. Ongoing

partnership work with Hodder Education will see us produce a Key Stage 3 textbook about the First World War, its causes, course and consequences, with supporting online materials reflecting the structure, interpretation and collections materials being used in the First World War Galleries at IWM London. The book and online resources will be as relevant for schools that do not or cannot visit the exhibition, as for those that do. We will continue our work with local communities, working closely with our Youth Advisors on our Centenary plans and our Young Reporters (who are covering the changes at IWM London in the lead-up to summer 2014). Our New Perspectives project will see young people exploring our archives and lesser-known histories of the First World War.

We will mark the 100th anniversary of the Battle of Somme in 2016 by making a factual film which will spark public debate around the cultural legacy of the use of film during the First World War. This film will be targeted to a wide audience, including young people, and will be screened in cinemas, music festivals and live venues around the UK and possibly internationally.

Broadcast will be a principal means of ensuring that there is significant awareness and engagement with the centenary of the First World War. The Corporate Plan allows for additional resource to achieve this objective. In 2012 we pulled together an integrated plan of commercial activities relating to the First World War centenary. This will be implemented so as to maximise commercial opportunities across all facets of our business and services, such as publishing and retail, image sales licensing, broadcast and curatorial support.

#### **4.4 Future IWM London masterplan phases**

In the last year of our Corporate Plan, our attention shifts to the development and implementation of the next phases of the masterplan for IWM London. Corporate priority funding has been set aside to address 'orphan spaces' resulting from the relocation of the café and main shop following the first phase of Regeneration. Our longer-term plans involve the creation of a new Learning Centre and Second World War Galleries and the construction of a new entrance, which will be accessible to all visitors to IWM London (currently the main entrance is not fully accessible but there is a separate step-free entrance).

#### **4.5 Corporate priorities**

Alongside our centenary plans, we have identified several corporate priorities that address our immediate business needs, with much of this work being delivered and achieved by teams working across IWM.

- § Our integrated public programme across all our branches
- § Continued investment in upgrading HMS *Belfast's* public offer – new interpretation for the Engine Room in 2013–14 and plans to replace the *War and Peace* and *Life at Sea* exhibitions in 2014–15
- § The development of the American Air Museum at IWM Duxford will see improvements to the building, object conservation and the redisplay of existing exhibitions
- § A successful HLF bid will see IWM North deliver a ground-breaking volunteer programme – Improving Futures: Volunteering for Well Being
- § The collections inventory project will be completed and we will continue to integrate our collections systems, facilitating a shift towards digital self-service for collections enquiries
- § The Collections Review process will continue to identify key acquisitions, manage the disposals programme and progress art commissioning over the corporate planning period
- § The IWM Duxford Northside project will improve our collections storage facilities and conditions

- § Delivery of the research programme remains a priority (including a high profile international conference on the experience of troops and civilians of the British Empire during the First World War)
- § Commercial priorities include the creation of new retail areas at IWM London, as well as an upgrade of the IWM Duxford shop in 2014–15
- § Digital activity will focus developing our mobile web offer and social interpretation software as well as website upgrades, in particular developing learning and family history sections and the 1914.org site
- § Investment in ICT infrastructure will focus on digital storage solutions and security provision
- § A new customer self-service payment solution will bring about business change, freeing up staff resource and offering a more accessible 24 hours a day, 7 days a week service to our customers
- § Our Estates masterplan work will continue to ensure that our buildings and estate are effectively and efficiently used, however, funds are only in place to support the highest priority work over the next three years
- § The IWM Duxford security project will see the continuing upgrading of the security systems on site
- § At HMS *Belfast* external funding has been secured to paint the ship side and further funds are being sought to undertake priority repairs to the funnels

#### **4.6 Our audiences**

Our Audience Development Strategy focuses on building audiences most likely to visit our branches and increasing our reach and reputation through digital channels. It informs all of our planning, in particular, our public programme (at our branches and online) and the marketing campaigns that support them.

Over the course of the Corporate Plan, our total visitor numbers are forecast to increase to 2.7 million by 2015–16 (from 2.3 million in 2011–12). Web visitors will increase to 6.5million and we will continue to use digital channels to increase engagement with our content and collections online.

Our First World War Centenary programme in 2014–15 will change the demographics of our audience, with an increase in both the diversity and volume of visitors to IWM London. The profile and reputation of IWM will also increase exponentially at this time, as reflected in the rise of overseas visitors from 2014–15 onwards and the projected increase in our economic impact through tourism.

#### **4.7 Access and inclusivity**

We seek to meet the duties of the Equality Act 2010 across all our work at IWM. In doing so, we try to ensure that any disadvantages suffered by people due to their protected characteristics (age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation) are removed or minimised and that we are able to build good relations with our users.

We aim to ensure that access provision, equality and diversity issues are considered when developing visitor services and our public programmes; from project initiation documents and throughout all exhibition project team meetings. We regularly review our equality objectives and all staff receive training in equality and diversity. Project design teams continue to work closely with their access advisory groups to ensure that the physical layout and architecture of our buildings, new exhibition spaces, services, amenities and our public programme are inclusive and accessible. The Regeneration: First World War Centenary Project, redevelopment of the American Air Museum at IWM

Duxford and new quayside facilities at HMS *Belfast* will enable us to make our branches more accessible.

#### **4.8 Managing our buildings and infrastructure**

Providing secure and appropriate storage for our collections, developing and using all IWM estate efficiently and ensuring that our ICT development and service delivery is aligned with our business needs are high, and often inter-related, priorities. A number of projects are in place to move us towards realising these aims (such as the IWM Duxford Northside project, a strategic space review at IWM London and ICT digital storage development). However, it must be noted that our lifecycle programme is risk-based and reduced funding in this area means that we are only addressing our most urgent reactive work, while a backlog of maintenance work remains. Contingency is built into our plan to cover any escalation of risk or major failure over the next financial year.

Significant effort continues to be made in reducing our levels of energy consumption. This Corporate Plan reflects reductions of a further 5 per cent for the fifth year in succession, having already achieved savings of between 5 and 15 per cent over the past four years.

#### **4.9 Digital development**

The transition to digital in the public domain is a high priority. Since the launch of our new website in late 2011, visitors to our website have grown significantly. Over the next three years we will continue to see increased levels of engagement from digital audiences as we invest in the continued development of our website and social interpretation offer. The development of a mobile web offer will ensure that we provide a seamless experience for mobile users accessing our website and wanting to engage with social interpretation. In turn, social interpretation within our galleries will facilitate richer, deeper engagement with our collections and help bring the physical and virtual experiences together. Online visitor numbers over this period are forecast to increase to 6.5 million by 2014–15 (from 3.9 million in 2011–12).

The transition towards digital will help us realise the opportunity that the First World War Centenary will bring. This will capitalise on the growing interest in family history and lifelong learning, which is creating an increasing demand for digital content.

Crucial to us achieving these aims is the ongoing modernisation of our commercial operations. A particular focus in 2013–14 will be on the image and film operations, with the implementation of new technologies enabling us to redefine our service and re-engineer our operational processes (through a shift to self-service).

The plan also provides in-house resource to deliver interactive media displays in our galleries and exhibitions as well as ongoing support to develop our website. Our longer-term aspiration is to fully embed digital media in all our work. Our Digital Media team will be working towards an appropriate model of distributed digital leadership to take this forward. In support of this, we will be creating a digital skills development programme that will equip all our staff with the confidence and knowledge required to achieve this cultural shift.

#### **4.10 Collections**

Making our collections accessible remains a key area of focus for Collections and Research teams. Ongoing upgrades to our advanced collections search capabilities and other online self-service resources will improve public access to material while reducing staff time spent on individual enquiries. This will allow curatorial expertise to be used more efficiently in supporting our public programmes,

commercial activities and in collection management. Improving our enquiries handling mechanisms and self-service resources involves investment in refining our data systems (into one coherent system).

Explore History will re-open at IWM London in 2013. Better layout and design, more activities, an improved web-search capability and new resources should boost attendance and engagement with all audiences, including our developmental target for Younger Empathisers (aged 25-34 years). This space will be kept under review as offsite digital use may cause a decrease in usage of this space. Our digitisation strategy will guide major digitisation, especially film, photos and documents, to meet commercial, public programmes and access needs and to achieve storage efficiency priorities.

High priority will be given to the IWM Duxford Northside project, which will improve and consolidate our collections storage, while reducing costs. Completion of the collections inventory and work on location data will improve accountability for the objects in our care. Our Collection Review will also be completed and disposals actions implemented. We will continue to build on recent successful funding applications to increase external grants for research, digitisation, acquisitions and other core work.

#### **4.11 Research**

Our Collaborative Doctoral Partnership proposal was submitted to the Arts and Humanities Research Council in late 2012. If our application is successful, we anticipate seeking approximately 9 to 12 studentships over a three-year period, starting in 2013. This will help us achieve a strong intellectual grasp of IWM's past history of collecting and an analysis to guide future collecting for conflicts post-1945. This includes conflicts arising from decolonisation, the Cold War, as well as contemporary operations and conflicts in Iraq, Afghanistan and around the world. It may also start to address the inter-war period. Students are expected to contribute directly to our work, for example, by undertaking documentation and contextualisation work. The new scheme represents a strong opportunity both to align high quality work by doctoral students with our own, and to build capacity for research.

An international conference on the experience of troops and civilians of the British Empire during the First World War will bring together academics, archivists, museum curators and community leaders, to highlight and discuss the role played by colonial troops. So far, the findings from a scoping study, funded by the Arts and Humanities Research Council, have highlighted that the theme of colonial troops and civilians in the two world wars is a strongly emerging one in the UK academic field, and that as a subject, it has been unfairly neglected. By learning more about this subject, communities who have a connection to it might gain a fresh understanding of their relationship to the history of Britain and its impact on the people of the British Empire.

#### **4.12 Fundraising**

Our goal remains to establish and maintain a broader base of interested and loyal donors at all levels, but in particular, those with the capacity to give significant gifts. We are developing a new unrestricted income stream through the launch of the patrons' scheme, which will generate income as well as build a loyal base of supporters with the potential to increase their level of support.

Our Development team will follow a very tailored approach to cultivation and 'asks' of high net worth individuals and trust and foundation prospects, with the ongoing support of the Trustees of the IWM Foundation and the main IWM board. In the immediate future, we are working to raise the balance for Regeneration: First World War Centenary Project phase one. We will build an IWM Friends donor base through the First World War appeal, which will help future funding initiatives. From 2015 we will need to raise funds for the next phase of the Regeneration programme.

Efforts will also continue on fundraising for other priority projects, such as Collections and Research and Public Programmes statutory bids. In the longer term, opportunities to generate legacies from our

wealthiest supporters will be reviewed, as will initiatives to build support through digital and mobile giving, to reach a broad donor base.

#### **4.13 Our staff**

We will continue to progress the actions of our most recent staff engagement survey, with a particular focus on addressing our behaviours and team working approach across the organisation. Once agreed, the recommendations of Project Simplify will be implemented with the view that reducing bureaucratic processes will bring about significant efficiencies and improved effectiveness. This, along with our strategic workforce development plans, will be high priority in the coming year.

Our Corporate Plan explores the establishment of an apprenticeship scheme, whereby we provide vocational training and skills development opportunities in a working capacity. By taking on apprentices we can ensure that key skills and knowledge are passed on to the next generation of the work-force. As well as training new staff, this will offer our current staff line management and mentoring opportunities. We proposed to pilot this scheme at IWM London and IWM North.

#### **4.14 Volunteers**

We have continued to enjoy significant support from volunteers working across the branches. Over 1,000 people gave their time to help our work last year and we want to sustain and build on this. Volunteering enables us to form positive connections with a more diverse section of the public, as demonstrated by IWM North's 'In Touch' volunteer programme, our supported blind and deaf volunteers on HMS *Belfast*, and those with learning difficulties now involved at the Churchill War Rooms, HMS *Belfast* and IWM Duxford.

In June 2013, IWM North will launch Improving Futures: Volunteering for Wellbeing, a significant HLF funded project which will enable the branch, jointly with The Manchester Museum, to recruit 180 new volunteers over the next three years. The project aims to create a trained volunteer workforce to support our visitor welcome, the audience experience and access to our collections. We will target people who are socially and economically isolated and through a bespoke training programme, delivered with The Manchester College, will support them to develop their skills, knowledge and confidence, enabling them to contribute significantly to the experience of visitors at the museums. We will also, through detailed evaluation, measure the impact of the programme on participants' individual wellbeing and commit to a thorough social return on investment evaluation of the outcomes of the project.

## 5. Financial strategy

Investment over the Corporate Plan period focuses on delivering strategic priorities and supporting modernisation. Fundraising income reflects the delivery of our capital projects and in particular, the redevelopment of IWM London. Salary expenditure reduces by 1 per cent over the plan period whilst commercial income increases by 18 per cent. Operational budgets reflect the project costs of Regeneration in year one of the Plan, reducing to £17 million by year three.

<b>Table 1: Corporate Plan 2013 financial overview</b>			
<b>Figures shown £000s</b>	<b>2013–14</b>	<b>2014–15</b>	<b>2015–16</b>
<b>Income</b>			
Fundraising	£21,474	£8,709	£13,228
Commercial	£16,491	£18,645	£19,538
Grant in aid	£20,284	£20,321	£18,899
<b>Total</b>	<b>£58,249</b>	<b>£47,675</b>	<b>£51,665</b>
<b>Expenditure</b>			
Operational budgets	£15,380	£16,256	£16,525
Salaries	£19,102	£19,264	£18,820
Corporate priorities	£4,521	£4,363	£9,904
Regeneration: IWM London Masterplan	£18,768	£7,445	£6,000
Contingency	£477	£346	£416
<b>Total</b>	<b>£58,249</b>	<b>£47,675</b>	<b>£51,665</b>

### 5.1 Contingency

The Corporate Plan incorporates contingency in each financial year in order to provide financial flexibility (for example, in the case of short-term variations to market conditions) and to build longer term reserves.

The successful regime of expenditure controls and cash flow management will continue. Budget forecasts are subject to detailed review on a quarterly basis. Budgets holders have real-time access to their budgets and are required to complete a formal review on a monthly basis.

A third of the annual budget amount is withheld until the actual results of the first six months of activity are known. In addition, projects that are to be funded from externally raised income will not be started until such funding is secure. These mechanisms have worked effectively in allowing us to adapt and respond within financial years without significant disruption.

### 5.2 Commercial activity

IWM has a broad commercial income base including retail, public catering, corporate hospitality and events, admissions (at the charging branches and for special exhibitions and events), publishing and collections sales and licensing. Our objective is to increase the total net profit we generate from our commercial activities.

IWM's Commercial Strategy (currently being finalised) incorporates the redefining of our commercial brand and its positioning to raise the visibility of, and engagement with IWM from a broad audience. This will help develop a strategic framework for our products and partnerships, to ensure that we are

taking a consistent approach and are valuing our brand accordingly. We expect the IWM brand to resonate more widely both in the UK and overseas and begin to increase its visibility in markets where we have had little commercial presence in the past. In particular, we will begin to strategically target the education sector in the UK and abroad through new partnerships in publishing and digitisation. We will also focus on the news and broadcasting industries through the launch of new image and film sales platforms and partnerships.

**Table 2: Corporate Plan 2013–16 commercial income**

Figures shown £000s	CP12 <sup>1</sup>	2013–14	%	2014–15	%	2015–16	%
Admissions income <sup>2</sup>	6,874	7,373	7%	7,812	6%	8,196	5%
Air Show income	1,484	1,532	3%	1,577	3%	1,620	3%
Retail income	3,552	3,485	-2%	4,445	28%	4,641	4%
Catering (Cafe) income	685	685	0%	858	25%	856	0%
Corporate events	1,295	1,434	1%	1,898	32%	2,144	13%
Collections income	805	913	13%	920	1%	928	1%
Commercial other <sup>3</sup>	1,660	1,069	-36%	1,135	6%	1,153	2%
<b>Total commercial income</b>	<b>16,355</b>	<b>16,491</b>	<b>1%</b>	<b>18,645</b>	<b>13%</b>	<b>19,538</b>	<b>5%</b>
<b>Net commercial profit</b>	<b>2,422</b>	<b>2,812</b>	<b>16%</b>	<b>4,038</b>	<b>44%</b>	<b>4,359</b>	<b>8%</b>

### 5.3 Corporate priorities

**Table 3: Corporate Plan 2013–16 corporate priority funding<sup>4</sup>**

Figures shown £000s	2013–14	2014–15	2015–16
Regeneration: IWM London Masterplan (phase one)	1,500	2,200	-
Regeneration: IWM London Masterplan (phase two)	-	4,000	6,000
Learning (brief for new Learning Centre)	-	38	-
Digital development	75	10	5
Commercial projects (including entrepreneurial fund and retail space development)	200	345	100
Collections projects (including digital self-service, conservation for Regeneration and DAMS)	178	96	115
ICT upgrade projects	240	85	58
London branch public programme <sup>5</sup>	588	934	1,655
IWM North public programme <sup>6</sup>	478	337	334
FM Projects (including IWM London strategic space review)	322	331	420
Security projects (including IWM Duxford upgrade)	107	65	65

<sup>1</sup> CP12 forecast (not actuals)

<sup>2</sup> Excludes gift aid

<sup>3</sup> In CP12 this figure included some income from IWM Corporate Hospitality fees. HMSB's insurance claim (for loss of business following the collapse of the gangway) also skews this figure

<sup>4</sup> This is a summary and not the full list of approved priority bids

<sup>5</sup> This budget includes exhibitions, interpretation across the three London branches as well as the events, marketing and PR campaigns to support the programme. It includes Lives of the First World War (FWW) and some FWW marketing campaigns

<sup>6</sup> This budget includes exhibitions and interpretation at IWM North as well as the events, marketing and PR campaigns to support the programme

**Table 3: Corporate Plan 2013–16 corporate priority funding<sup>4</sup>**

<b>Figures shown £000s</b>	<b>2013–14</b>	<b>2014–15</b>	<b>2015–16</b>
IWM Duxford projects (including Northside development)	450	405	400
IWMN visitor welcome and foyer redevelopment	20	-	280
HMS <i>Belfast</i> projects (including upgrade of fresh water systems and asbestos works)	12	92	93
<b>External funding</b>			
Churchill War Rooms phased multimedia upgrades	75	40	250
IWM Duxford redevelopment of American Air Museum	190	261	3,558
IWM Duxford relocation of building 420 (to enable the Northside project)	168	20	-
HMS <i>Belfast</i> projects	190	-	-
IWM North Improving Futures; Volunteering for Wellbeing project ( <i>HLF funded</i> )	197	119	160
IWM London Atrium learning stations	32	1	1
IWM War Story project	120	120	120
IWM London Secret War exhibition refurbishment	122	-	-

## 6. Key performance indicators

We use the indicators below to measure our progress in delivering our Corporate Plan. Some of these targets are included in our management agreement with DCMS whilst others have been developed to help us monitor our activity, and in many instances, benchmark our progress internally and externally.

PI ref	Description of measure	2013–14 (000s)	2014–15 (000s)	2015–16 (000s)
<b>Audience centred</b>				
KPI 1	Total visitor numbers <sup>7</sup>	1,902	2,658	2,715
KPI 2	Admissions income gross <sup>8</sup> (£)	7,373	7,812	8,196
KPI 3	Proportion of UK adult visitors from lower socio-economic groups	17%	18%	18%
KPI 4	Proportion of BME UK adult visitors	5%	6%	6%
KPI 5	Proportion of UK adult visitors with a limiting disability	6%	6%	6%
KPI 6	Proportion of repeat visitors	35%	39%	39%
KPI 7	Proportion of overseas visitors	38%	42%	42%
<b>Relevant</b>				
KPI 8	Visitor satisfaction (proportion of people who will definitely recommend a visit)	74%	78%	78%
KPI 9	Visitor satisfaction (proportion of people who classify their visit as excellent)	55%	59%	60%
KPI 10	Child learners up to 18 yrs (on site)	261	297	305
KPI 11	Total on site learners (adults + children)	401	447	457
KPI 12	Number of volunteers supporting IWM (exact number reported)	1,189	1,251	1,272
KPI 13	Number of research publications <sup>9</sup>	20	20	20
<b>Continuously evolving</b>				
KPI 14	Self-generated income as proportion of total operating income	65%	54%	64%
KPI 15	Fixed costs (% of total operating costs) <sup>10</sup>	72%	70%	67%
KPI 16	Restricted fundraising income (£)	20,668	3,805	12,251
KPI 17	Unrestricted fundraising income (£)	761	904	977

<sup>7</sup> excluding corporate hospitality

<sup>8</sup> This figure includes admissions and gift aid income from the charging branches as well as education and exhibition admissions. It excludes our gift aid claim, income from CWR Lates and Air Show income

<sup>9</sup> this includes publications (papers, books, chapters and articles) of over 4,000 words produced using new research and number of co-edited books and conference papers over 2,500 words, plus expert/specialist assistance

<sup>10</sup> Fixed costs include buildings, salaries, utilities

PI ref	Description of measure	2013–14 (000s)	2014–15 (000s)	2015–16 (000s)
KPI 18	Wider economic impact through tourism (AIM Model) (£)	82,250	121,856	124,132
KPI 19	Net profit from commercial activities ( <i>all Trading Company activities</i> ) (£)	2,812	4,038	4,359
KPI 19	Net profit from commercial activities ( <i>all Trading Company activities</i> ) (%)	30%	37%	40%

### High profile

KPI 20	Media coverage (value of coverage, AVE) (£)	20,900	32,500	24,600
KPI 21	Media coverage (volume)	9	12	8
KPI 22	Number of Centenary partners (exact numbers reported)	820	940	980
KPI 23	Total web visitors (total online users)	5,400	6,500	6,500
KPI 24	UK Loan Venues (new loans)	20	20	25
KPI 25	Total number of enquiries and researchers to all collections departments (for example, users of <i>Explore History</i> )	62	74	77

### Efficient and effective

KPI 26	Number of collections items reviewed at collection level	100	100	100
KPI 27	Percentage of presented acquisitions requests approved at CRC	80%	80%	80%
KPI 28	Number of objects documented at inventory level (exact numbers reported)	2,500	2,500	2,500
KPI 29	Number of digital files produced	85	72	72
KPI 30	Percentage of collections stored and displayed in correct environmental conditions	25%	28%	30%
KPI 31	Number of training days per employee (exact numbers reported)	3.3	3.4	3.5
KPI 32	Number of short and medium-term sick days per employee <sup>11</sup> (exact numbers reported)	3.0	2.9	2.8
KPI 33	Percentage reduction in energy consumption	-5%	0%	0%

<sup>11</sup> This excludes long-term sick 21+ days

## 7. Highlights of our integrated public programme

Year one Integrated public programme 2013–14	2013									2014		
	A	M	J	J	A	S	O	N	D	J	F	M
<b>IWM London</b>												
A Family in Wartime [B34]	IWM closed to the public											
Horrible Histories Spies [D36]												
Architecture of War [D E]												
White Box – Omer Fast [D40]												
War Story Display [B West Entrance]												
Donovan Wylie [DW]												
White Box – Mike Moore/Lee Craker [D40]												
White Box – Rosalind Nashashibi [D40]												
<b>IWM North</b>												
Saving Lives [Special Exhibition Gallery]												
IWM Contemporary Art [SEG]												
10th Anniversary Iraq [Waterway]												
Reactions: Chava Rosenzweig [MES]												
10th Anniversary Iraq [Large Frames Exterior]												
Horrible Histories Rationing Big Picture Show												

Year two Integrated public programme 2014–15	2014									2015		
	A	M	J	J	A	S	O	N	D	J	F	M
<b>IWM London</b>												
A Family in Wartime [B34]												
Horrible Histories Spies [D36]												
White Box – Mark Neville [D40]												
New First World War Galleries [A floor]												
Large objects – Icons of War [A floor atrium]												
Large objects – Second World War [B atrium]												
Large objects – Post -1945 [C Balcony]												
Large objects [D Balcony]												
Truth and Memory [DE, DW]												
White Box – Jane and Louise Wilson [D40]												
White Box – Hew Locke [D40]												
<b>IWM North</b>												
First World War [Special Exhibition Gallery]												
Reactions: Mark Anstee [MES Gallery]												
N. Ireland Art [Special Exhibition Gallery]												
N. Ireland Art Photography [Waterway]												

Year three Integrated public programme 2014–15	2015										2016		
	A	M	J	J	A	S	O	N	D	J	F	M	
<b>IWM London</b>													
War Couture [D36]													
Above and Below [DE]													
Nuclear Reactions [DW]													
White Box – Edward Barber [D40]													
Lee Miller [D36]													
White Box – Kerry Tribe [D40]													
White Box – Nick Danziger [D40]													
<b>IWM North</b>													
N. Ireland Art [Special Exhibition Gallery]													
N. Ireland Art Photography [Waterway]													
Horrible Histories: Blitzed Brits (SEG)													