



People's History Museum Business Plan 2022-2023

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1. Introduction

Background and context

PHM is proud to be a museum of national significance with a home in Greater Manchester and will continue to ensure relevance and resonance with people's lives. PHM's mission is to encourage people to care more about community and society, to speak up and to take a stand on the issues that matter to them. We will help people find and share their voice, bringing them together to play their part and take action. We already have the amazing collections, unique stories, big ideas, passion and the commitment of our people. We will continue to build on past successes, seize new opportunities, use our resources effectively to be even more confident and ambitious for the future.

In 2020, PHM celebrated its tenth birthday (since the capital redevelopment) and 30 years in Greater Manchester – using the moment to reflect on past successes, launch its ten-year [Impact Report](#) and look ahead with ambition for the future. A new **vision, mission and role** were developed at this time in consultation with stakeholders and supporters and with the involvement of PHM Trustees, staff and volunteers. Plans to embed this new vision into a ten-year strategy for the museum were underway when the impact of Covid-19 hit and the museum had to close its doors in March 2020.

In 2020-21, PHM responded to the series of lockdowns and restrictions caused by Covid-19, with closure and disruption to museum services and the pivot to remote working, digital delivery and new models of enterprise being tested. As with the rest of the arts and cultural sector, the museum changed in response to the world around it, transforming at speed to maintain relationships with audiences and engage new communities through its collections, communications and programmes online.

In 2021-22, PHM reopened to the public, welcoming people back to the museum for its Migration programme and More in Common project – engaging them with the powerful and relevant content created in collaboration with individuals and communities with lived experience of migration. Visitor demand and confidence returned quite quickly with strong engagement levels in 2021, but events and groups were slower to return, giving PHM the opportunity to reflect and plan for the future, while also challenging business models and income streams. The end of 2021 saw more uncertainty and further impact from the pandemic, with the Omicron variant affecting visitor confidence, attendance and commercial income.

Heading into 2022-23, the museum is in a stable and optimistic position thanks to the work of the amazing PHM team (Trustees, staff, volunteers and collaborators). PHM continues to be ambitious and committed to the high quality of its work; not only in engagement programming and projects, but also in enterprise activities, services and events. Future work will be underpinned by a strong focus on financial sustainability and robust, data-led management and decision making; building the foundations needed for strength, dynamism and agility in response to the ongoing changes and challenges facing the organisation as well as Greater Manchester, the UK and the world.

As the whole PHM team works together to achieve a fairer society where people's voices and actions make a difference, the museum will take a bolder approach to its work as an Activist Museum. PHM has a long and successful track-record of collaborating with communities to develop programmes where hidden stories, unheard voices and lived experience are at their heart. This will continue to be integral to the museum's approach to being inclusive and relevant to people's lives locally and nationally. It will also connect the museum's stories and collections with current issues and inequalities as part of a strong remit to create change - challenging inequality and apathy, and inspiring positive action.

Strategic fit

PHM recognises the importance of working closely and in collaboration with funders, stakeholders and partners to achieve its vision and deliver its aims and priorities. These relationships give the museum strength, support, reach and inspiration – enabling the museum to achieve so much more together than it could do on its own.

Appendix 4 provides more details of PHM's fit with key strategic frameworks and the close connection between the museum's aims and priorities and those of its funders and stakeholders.

During 2022-23, PHM will continue to develop, deliver and measure the impact of its work locally, regionally, nationally and internationally with reference to these frameworks (especially Arts Council and Greater Manchester Combined Authority). We will continue to play our part in achieving local and national priorities for inclusion and access, economic regeneration, re-animating places and spaces, supporting wellbeing, tackling environmental crisis, supporting artists and freelancers and connecting and collaborating with communities.

In focusing our attention, resources and capacity in the most effective way to achieve the biggest impact, there are four strategic aims at the heart of this Plan, alongside four underpinning priorities which will flow through all our work. Each of these is explored in more detail below with activities and objectives mapped out in the Activity Plan in Appendix 2.

Business Plan approval

This Business Plan for 2022-23 builds on the framework of the museum's previous plan for 2021-22 and provides an interim plan for one year while we continue to recover from the pandemic and use learning from the last two years to inspire future change, growth and innovation. This plan forms PHM's application to the Arts Council for the 2022/23 extension of NPO funding, as well as responding to the priorities of other funders and stakeholders.

In preparing this Business Plan the Board of Trustees have seen all relevant strategic frameworks and supporting documents (including the Arts Council's Investment Principles). Trustees have been involved in shaping content and reviewing drafts of the Plan. They have approved the 2022-23 Business Plan at the Board Meeting on 11 February 2022 prior to its submission to the Arts Council.

Dated: 25.02.22

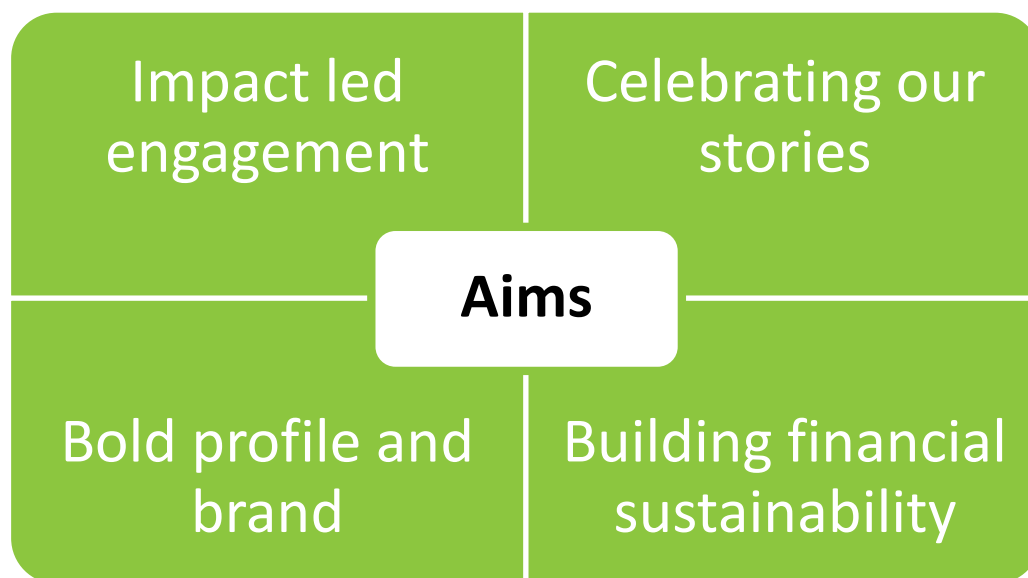
2. Our vision, mission and role



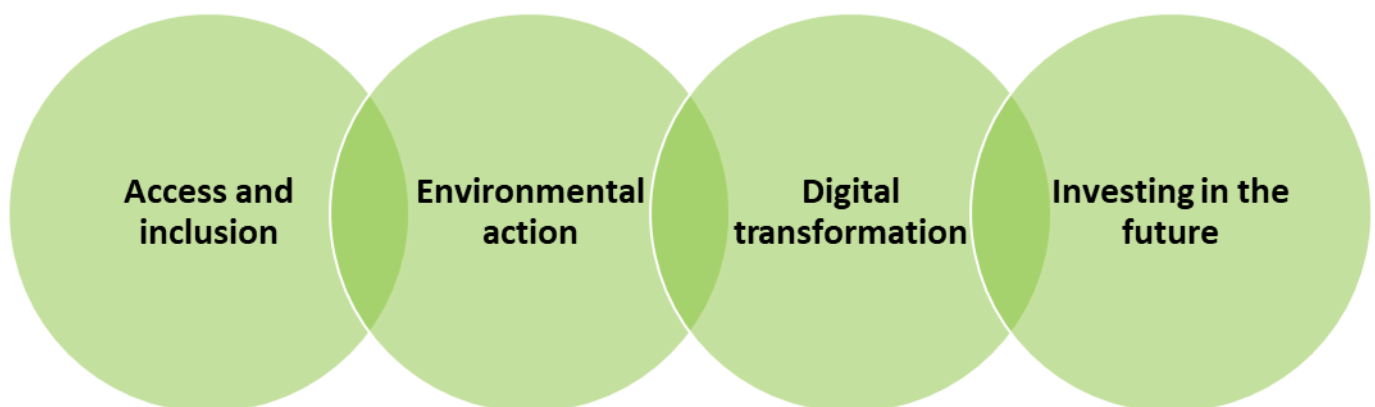
3. Our Aims and Priorities

PHM has four aims at the heart of this Business Plan which all intersect and overlap as the team works collectively to achieve the museum's vision and mission, and to deliver an ambitious programme of work. These aims have been developed to span across all of the museum's teams and services and to ensure effective use of staff time and expertise, resources and assets to achieve shared goals.

PHM also has four underpinning priorities which connect with the museum's values and support all of the work to achieve the Business Plan aims. These priorities are developed and delivered by cross-departmental working groups (with staff and Trustee representation) and connect closely with the priorities of PHM's funders and stakeholders.



Priorities



Each of these are outlined below including:

- Our ambition
- Our current position
- Our future direction

The **activity plan** (Appendix 4) then provides more details of how these objectives and priorities will be delivered over the coming year. PHM will then further develop a set of cascaded SMART objectives from an organisation level to departments, teams and individual activities and targets. The entire PHM team will play a part and understand their roles and responsibilities in helping to achieve PHM's ambition.

AIM 1. Impact led engagement

Our ambition

We will increase the impact we have, to best deliver our vision of a fairer society where people's voices and actions make a difference. We will select the most appropriate and impactful engagement methods and tools to share our stories of activism and inspire positive action in others. We will understand the impact of our engagement, capturing the positive changes and actions inspired by our work. We will deepen our impact by guiding our audiences to the next engagement opportunity in their journey with PHM and beyond.

Our current position

Since 2017, PHM has had a programme-led approach at the heart of its Business Plan with a series of programmes responding to and amplifying major anniversaries and issues (Never Going Underground in 2017, Represent? in 2018, and Disrupt! In 2019).

During the pandemic, PHM took much of its programme content, events and activities online and invested time and resource into creating an excellent menu for online audiences – [Ideas Worth Exploring – At Home and Online](#). This included a [virtual tour](#) of the museum (created in partnership with Manchester University), PHM content on [Google Arts and Culture](#) and new [family friendly activities](#) amongst other things.

While closed, the museum had the opportunity (and necessity) to think carefully about its engagement with audiences and communities and the impact its work was having. Being able to collect and analyse new data about online audiences, and those registering to visit when the museum was able to open, has engaged the team in thinking more about audiences and the impact and outcomes of PHM's work.

Reopening in 2021, PHM shared new content with audiences from the delayed Migration programme and More in Common project, including gallery interventions, exhibitions and events. The programme was co-curated by a Community Programme Team made up of five individuals whose own lives have all been shaped by migration. Their combined experiences put them in a unique position to examine the topic of migration in today's world, to reflect upon the global situation and to look at the stories of underrepresented groups. This approach of engaging community programmers or curators in a paid capacity is part of PHM's wider commitment to ensure all programmes are shaped by people with lived experience of the area of focus or issues being explored, and that they are paid fairly for their contributions and work.

Our future direction

Looking ahead, PHM will embed an impact led approach to engagement, in line with a newly developed engagement strategy with the following major engagement theme and priority development areas:

Nothing About Us Without Us (NAUWU)

PHM will explore the theme of disabled people's rights and activism through a co-curated exhibition and an accompanying programme of events from early 2022 to late 2024.

Behind the scenes, staff will be working with disabled people to make the organisation and its public programme more accessible. This will include anyone who identifies as a disabled person, such as (but not exclusively) deaf, autistic, neurodiverse, learning disabled people, people with first hand lived experience of mental illness, chronic illness and fatigue and service users/survivors of mental distress; movements, communities and individuals.

As part of [Nothing About Us Without Us](#), we will be working with disabled people to explore the museum's collection and review how the history of disabled people has been documented, interpreted and communicated. This programme of activity is guided by a steering group of disabled people, some of whom represent disabled people's organisations, alongside non-disabled allies. A key objective of the programme is to raise awareness of the social model of disability through our work.

Collaborating with communities

The museum will continue to collaborate and work closely with its communities to build meaningful and lasting relationships. This engagement will take many forms, including:

- Paid creative opportunities and roles for individuals who can add value to museum themes through lived experience

- Steering groups, panels and other forums where people can come together to make decisions and shape practice across the museum
- Regular evaluation and feedback opportunities for everyone working with PHM and participating in programmes and activities
- A commitment to more deeply understanding the power imbalances that are present when working with communities and to meaningfully address this as we evolve our co-curation models and working practices

PHM will also continue to work with freelance artists, actors and practitioners and will take a more proactive approach to diversifying the people who collaborate with the museum. PHM will reflect on how successful its approach to sharing opportunities to collaborate have been in the past (through open calls and advertisement) and reach out to those it most wants to work with and who might not otherwise have the opportunity to work with the museum.

Understanding and measuring impact

PHM will be clear about the impact it makes through its ambitious, high-quality work and will be able to measure and evidence the difference the museum makes to the world. This will include:

- Agreeing clear outcomes and SMART targets which will provide evidence of the action that people take as a result of engaging with the museum
- Reviewing demographic data to set a new baseline for who is currently engaging with PHM and what future targets will be as part of the Equality, Diversity and Inclusion Action Plan
- Reviewing the current Audience Development Plan to agree future outcomes and targets for more, different and deeper
- Exploring different audience journeys to recognise the different levels of engagement taking place and the value they have
- Ongoing use of existing tools (Audience Finder and Impact and Insight) as part of a consistent evaluation methodology across PHM's work

Being able to understand and share the museum's impact will help the team make impact-led and evidence-based decisions about work that needs to be scaled up, work that needs to stop, and where the museum is best able to use its resources and capacity to achieve its vision.

Taking a blended approach to engagement

PHM's building, physical spaces, exhibits and visitor experience team are some of its most important and valuable assets. The onsite visitor experience is essential to creating the impact we want to see in people, communities and society and our team will continue to build on the excellent customer service they provide and connect audiences with our collections and stories (see Aim 2) in meaningful ways.

Audiences will also continue to look for access to high quality online content, and digital tools and platforms will also enable the museum to engage more and different audiences in creative ways. Learning from digital and hybrid engagement activities that have taken place Apr-Dec 2021, as part of our Respond and Reimagine grant, will inform the blended approach to be taken in 2022-23 and beyond. Blended approaches will be embedded in engagement strategy and planning.

Working with children and young people

PHM will be embarking on an exciting project to review its learning offer for early years, schools, higher education, adult and community groups. Building on conversations that began during the first lockdown, the review will formally take place across 2022 and 2023.

There will be an initial period of research and consultation with staff, our dedicated freelance team and community and formal groups and partners. This will be followed by testing and evaluation of our learning workshops. These include living history performances, art-based workshops, creative writing, early years sessions, city centre trails, guided tours and archive sessions. By March 2023 we will have an in depth understanding of how our learning programme can be challenging, relevant and impactful.

The review will:

- Ensure the Learning Programme connects with the new mission, vision and Engagement Strategy.

- Consider how we can be more inclusive and accessible as part of the museum's drive to be a leader in this area with a focus on best practice.
- Involve working partnerships with schools, Higher Education and communities to understand the requirements for each audience.
- Provide training opportunities for staff (including freelance staff) to be confident facilitating difficult conversations, build knowledge of the collections and to understand important topics such as anti-racism and disability awareness.
- Consider how the learning programme can represent diverse histories and support the work to decolonise the museum.
- Investigate how we can best reach those unable to visit and to enhance engagement, through harnessing digital, developing outreach and extending our knowledge of the curriculum.
- Be guided by the requirements of our audiences both existing and future which will be incorporated in the development of our learning content.
- Reassess the business model of learning programme, including a review of freelancer, contracts, pay and conditions.

AIM 2. Celebrating our stories

Our ambition

Our collection and archives are the foundation of our inspiring stories of activism. They capture the moments when people's voices and actions have inspired greater democracy, equality, justice and co-operation. We will strengthen our knowledge of these collections through research, consultation and investment in our digital systems. This will enable us to access and share our inspirational stories more easily and effectively.

Contemporary collecting will be at the heart of our work. We will ensure our collecting practices are inclusive and representative to ensure we can tell inspiring stories of activism from a range of diverse perspectives.

Our current position

PHM's entire collection is Designated as being of national significance and is at the heart of audience engagement and visitor experience as well as being of huge importance for research and improving understanding of the stories shared by the museum.

In recent years, the museum has continued to build and strengthen the collection with active contemporary collecting around annual programme themes and acquisitions secured through donations and purchases (with Heritage Fund support). The museum's collection is diverse with strengths in many areas which are relevant and resonant with the world today and PHM is passionate about providing access to collections in a way that helps further its vision and mission.

As PHM's collection has grown, our collections management systems and processes have struggled to keep pace. This means that we are not able to be as proactive and strategic about our acquisitions, contemporary collecting and sharing our stories as we want to be. In 2021/22, we began work to procure a Digital Asset Management System as part of a two-year Designation Development Fund project to increase access to our poster collection, as well as undertaking an IP review with support from Naomi Korn Associates. We paused our collecting and loans programmes at the start of 2022 for 12 months to enable a strategic review of our policies and processes, ahead of our next Accreditation submission (expected 2022/early 2023).

Our future direction

In 2022-23 PHM will continue to enhance access to and understanding of the stories within the collections through a number of pieces of work:

Auditing and understanding the collection

PHM will continue to audit aspects of the collection to uncover the stories they tell and to find gaps for future collecting. This will include audits of:

- Material covering disabled people's rights and activism to feed into the Nothing About Us Without Us theme
- The poster collection as part of a two-year Designation Development Fund (DDF) project (running from Summer 2021 for two years) to audit, catalogue and digitise 4-5000 posters covering themes from the Spanish Civil War to general elections, anti-racism campaigns and other social movements in support of democracy and change

PHM is also partnering with Manchester University on a Collaborative Doctoral Award - 'Total Liberation': Feminism, Socialism and Red Rag (1972-1980) - cataloguing and promoting the PHM's holdings in feminist history to help shine a light on this area of the museum's collection and using the collections to engage in contemporary debate around equality.

Decolonising the collection

PHM's Researcher and Manchester Metropolitan University lecturer Dr Shirin Hirsch will be leading on research and engagement to decolonise the museum's exhibitions and collections. Building on the Migration programme work in 2020-22, this will help PHM to uncover and amplify diversity within collections and stories, increasing representation, ensuring access, and improving understanding.

An audit of the museum's main galleries conducted between January and March 2022 will kickstart this work and form the basis of an action plan of short, medium and long-term actions, goals, conversations and consultations. This work will lay the foundations for a future capital redevelopment of PHM's main galleries. Ultimately, this will enable us to make the museum more representative and welcoming to a wider and more diverse range of people.

Implementing and reviewing digital systems

The museum's DDF project includes the introduction of a Digital Asset Management System (DAMS) which will enable the digitisation of more of the collection, with better collections information made accessible to staff and audiences. This will improve research, collections knowledge and connect with future engagement opportunities. The DAM system is due to be implemented in April 2022 with images of around 3-4000 posters being ingested into the system in 2022/23.

An audit of collections assets currently held on PHM's servers will be conducted and will form the basis of an action plan for migrating these assets to the DAMS. The current 'search the collections' portal on PHM's website will be revamped, with museum collections and archive assets separated into distinct portals, as the current system does not have to appropriate archival hierarchy making searches cumbersome and frustrating.

A bid has been submitted to the John Ellerman Foundation to fund a three-year curatorial post and advance DAMS development. If successful, this will enable PHM to further deepen collections knowledge and democratise collections access.

Improving IP rights and records management

In 2022/23, we will implement a new IP Policy developed with Naomi Korn Associates. This will improve IPR management within the team, ensuring compliance and greater confidence to use digital assets within a risk-managed approach.

As part of the work with Naomi Korn Associates, we have identified that the existing bailment/deposit agreements with the Communist Party Archive Trust and the Labour Party are insufficient and need to be updated. This will enable PHM to utilise these important collections to their potential and share the important stories held within them more widely. To do this, we will consult with the Communist Party Archive Trust and the Labour Party to update these agreements.

We will also continue to conduct a data protection audit of the archive collections. This will more clearly identify and mark sensitive material that requires closing or would necessitate researchers to sign a Data Protection Form. There are also areas of the collection that have never been open to researchers when perhaps they could be; this audit will also assess and, where appropriate, open records in this category.

Strategic acquisitions and contemporary collecting

PHM has been committed to collecting contemporary material and stories and has focused in recent years on programme themes to ensure representation of current campaigns and issues. Decisions on acquisitions are made by a panel of PHM staff representing different departments, from collections to exhibitions, conservation to engagement. Despite procedures for assessing acquisitions against our collecting policy and other criteria, PHM still accepts more new acquisitions than it has the resources to catalogue, conserve and care for. We have also become increasingly aware of the need to diversify the sources of our acquisitions to ensure our contemporary collections are more inclusive and authentic.

In order to take a more strategic approach to acquisitions and contemporary collecting, we have paused our acquisitions and loans out to enable the team to review these areas, ahead of our next Accreditation submission (expected 2022/early 2023). Following the review, PHM will be in a stronger position to diversify its collections and the stories it tells, connecting its engagement work and being more proactive in reaching out to new donors and building relationships with communities. We will better understand where we need to act, and be able respond quickly to public requests, national stories, and events, but will also be better able to proactively share our collections with audiences and democratise both access to our collection and involvement in acquisitions in the future.

We will apply to the Esmée Fairbairn Collections Fund for a Collections Engagement Officer post to further this work by building stronger community links and a network of community ambassadors.

Nothing About Us Without Us (NAUWU)

Whilst we have paused our main acquisitions and loans out activity, we will continue to collect where necessary to achieve the aims of the NAUWU programme about disabled people's rights and activism. Acquisitions will be guided by four NAUWU Community Curators to feed into the headline exhibition for NAUWU and a programme of community exhibitions. As with many of our past programme themes, many items will feature in this exhibition initially as loans from the community; we will build trust with lenders to translate some of these loans into acquisitions to strengthen our collections.

AIM 3. Bold profile and brand

Our ambition

We want to be known nationally and internationally for our inspiring stories of activism, for placing communities at the heart of our approach, and for the expertise and assets we represent. We want to engage a greater range of different people and in greater numbers with our museum, communicating with them through our profile and brand to build strong relationships for the future.

We will ensure our communications are built around our stories of activism to inspire positive action and change, with a strategy that's bolder, ever more relevant, and resonates powerfully with people's lives. We want to live the values embodied in our galleries, visibly being an advocate for change, using our voice to campaign and champion issues linked to our programme, and supporting audiences to do the same.

Our current position

During 2021-22, we strengthened our approach to bold communications as an Activist Museum. Our Migration programme has taken place in the context of a national conversation about migration, in particular proposals to reform the refugee and asylum system through the introduction of the Nationality and Borders Bill. The proposed changes will directly impact the rights of the people featured in our galleries and could radically reshape the lives and work of the partners and individuals involved in developing this programme. Having heard these personal stories and worked with the Community Programme Team and partners for two years, we felt compelled to speak out and use our platform to support campaigns against proposals in the Bill.

We have been working with national campaigning organisations such as Together with Refugees and Amnesty International to increase awareness of the Nationality and Borders Bill and its impact for refugees and asylum seekers coming to Britain. We launched a campaign to encourage people to act now to lobby for changes, with dedicated space throughout the museum highlighting the issue, including displays on our windows and action points within the galleries. We have used our digital and physical spaces to raise awareness of the Bill and its impact, and provided multiple channels for people to take action, from signing a national petition to writing a postcard to the Home Secretary. We have written about the campaign in publications including *Museums Journal* and *The Big Issue*. Our work has been recognised nationally, as one of four winners of the Activist Museum Award - [Four projects win Activist Museum Award 2021-2022 - Museums Association](#)

Our work has focussed on joining and supporting national campaigns which have clear links to our programme themes and core purpose. Working in partnership with campaigning organisations and through coalitions to impact change, we have supported and amplified national calls to action and learned a huge amount as an organisation.

Through this work, we also recognised the need to further develop our skills and understanding of approaches to campaigning and where our influence lies. To support this, we have worked with members of our board to get a detailed understanding of how legislation moves through Parliament, which avenues we can take to maximise our influence and which approaches are best suited.

Our future direction

PHM will continue to be bolder, strategic and relevant in its communications and marketing presence, seeking to strengthen PHM's profile and brand. By sharing and promoting quality experiences, products and journeys, the whole organisation will be involved in protecting and strengthening this brand, helping maximise the impact of PHM's work:

Taking a strategic approach to communications – internal collaboration and cross-working

We will develop a collaborative approach to our Communications and Marketing Strategy and our new Engagement Strategy, with a shared commitment to delivering PHM's vision and mission. We will work to strengthen our approach through internal collaboration, utilising the expertise of our marketing and engagement teams to create a strong, outcome-focussed offer for audiences. We will establish a single planning calendar for the whole organisation that includes all activity –connecting the stories we tell with anniversaries and awareness days, supporting learning events and highlighting fundraisers. We will adopt a culture of collaborative working as standard, creating cross-organisational teams around projects and

themes to maximise impact. This joint planning will be led through collective planning meetings, to enable all teams to look for opportunities to maximise our reach and impact. Utilising data, insight and experience gained through marketing and communications, as well as strong relations with media and third party organisations, we'll carefully plan how we take our campaigns live to maximise impact and cut-through, with PR, social media, creative marketing and direct comms all playing significant roles.

Utilising data in marketing and communications

We will create a marketing dashboard which brings together data from across our marketing channels and audience insights. This will support decision-making across the organisation, informing decisions around when to hold an event for maximum impact, through to which channel will be most effective to reach our desired audience. This will also provide a benchmark for our current audience and channel profile and behaviours from which to test and try new ideas, with a view to growing and diversifying to new groups.

We'll continue to grow our influence and reach through PR, using the museum – its stories, collections, campaigns and experts – to create audience engagement, to gain a greater share of voice, to open up issues-based conversations and to share content that supports the themes that we are exploring and reflects our values. We don't just want to send out information – we want journalists, writers and influencers to visit the museum to experience our work and to use our spaces to further explore our stories through their writing, films, blogs and more. Our press office will actively continue to develop strong media relations and steer these towards helping the museum to achieve its vision.

We want to create a digital environment which offers space for social interaction, contributing, critical thinking and reflection – not just putting content out, but engaging with our audience. We will test different approaches to communications to see what kind of content our audiences respond to, testing different tools to create conversational and interactive social media. These insights will shape PHM's compelling communications and audience journeys, ensuring our appeal to a range of audiences, helping reach more, different, and diverse people. We will ensure communications and marketing campaigns are efficient and effective.

We will evolve our approach to our CRM system, to support better segmentation of our audience and tailored messaging. We will create new workflows, to ensure a seamless transition from engaging with PHM at a visit, event, donation or shop purchase to being invited to join our regular newsletter and be closer to our work. We will grow our regular audience in this way and retain them through providing engaging and tailored content.

Raising our profile and position

We will evolve our approach to bold communications, building on our learning from our campaigning work.

We will focus our activity on:

- Becoming a place that facilitates conversations about complex issues and acts as a catalyst for change. We already use our space online and onsite to raise awareness, but now we want to evolve our Activist Museum approach further by equipping our team with the skills to actively engage audiences with our campaigning issues in a way that is safe and productive. Through the Activist Museum Award network, we will train our team in skills to engage visitors in conversation about our campaign issues. Our ambition is to deepen our commitment to being an Activist Museum by not only informing people, but by actively engaging them through conversations, events and other activities. We want our whole team to become campaign advocates, with the skills and confidence to proactively engage people and facilitate conversations about complex issues.
- Leading a cross-stakeholder conversation to define the issues that we will campaign on, based on our vision and values, our programme themes and where we can have the most influence. Through this conversation, we will specifically work with the NAUWU steering group in 2022/23 to identify key issues linked to disabled people's rights and activism where we can lead campaigns, as well as join them and amplify voices that have not been heard.
- Being clear on the actions we want to inspire people to take and on which campaigns and movements we amplify. We will use our storytelling approach and our collections to contribute to contemporary issues, helping maximise our impact. In using our expertise, PHM will be actively contributing to contemporary issues of equality and social justice, demonstrating the relevance of the museum.

AIM 4. Building financial sustainability

Our ambition

We will diversify our income sources, taking a dynamic approach to building our self-sufficiency and financial resilience in response to external pressures and opportunities. By so doing, we will become increasingly enterprising to maximise our resources and assets in order to safeguard the heritage in our care. By becoming financially stronger, we can create an even greater impact.

We will develop a social enterprise model for PHM, maximising income through our retail, events and catering arms in order to increase our impact for audiences and communities. Balancing our social purpose with commercial income will be essential to our commitment to profit for purpose across the whole team.

We will focus on strengthening the foundations of our work, with clear performance management and measures in place. Assessment of new opportunities and risks through rigorous analysis of data will enable strategic diversification and maximisation of self-generated income.

Our current position

The museum operates in a challenging public funding environment, which has become ever more competitive as we continue to recover from the pandemic. PHM has strong foundations in place to generate additional income from individual giving and enterprise activities, helping the organisation to build financial resilience and mitigate risk.

PHM receives support from Arts Council England (with NPO status), Greater Manchester Combined Authority (GMCA) and Manchester City Council (MCC) as the museum's major funders and stakeholders. PHM also has secured project funding from the National Lottery Heritage Fund, Designation Development Fund, and a number of other funders, placing the museum in a stable position for this period of recovery and growth in 2022-23.

We have undertaken a review of our onsite and regular donor offers, creating new materials using decision science principles to increase the number and value of donations. These are strongly linked to our social purpose so that donors are clear about the impact of their support for the museum, and the difference it makes. Coupled with this, we have made improvements to our CRM system to tailor it to our needs and carried out an exercise to consolidate our contacts, putting us in a stronger position for next financial year.

Our trading activity is currently focussed around three core commercial streams of café catering, retail, and venue hire. To date, this has operated on a low budget and has not been proactively marketed, but has achieved a modest but steady profit for the museum.

Due to the impact of Covid-19 on the museum's ability to generate trading income, PHM has been extremely reliant on grants, donations and legacies to fund its work in 2020 and 2021, with 82% of its income coming from these sources in the financial year 2020/21. As we begin to recover from the pandemic, we are now seeking to rebuild our commercial income and generate more sustainable sources of income. The pandemic has had the biggest impact on venue hire and events, with bookings returning slowly and steadily but expected to only achieve a maximum of 50% of income from previous years. We have seen a change in customer need, as our venue hire clients have been more focused on social and leisure occasions than our previous corporate and conference clients, which has meant more out of hours events and increased planning required to respond. We have also used this time to test hybrid event models which enable increased flexibility for clients. We recognise the need to pivot our model in line with this changed demand, and have been working to update our offer in line with this. We believe this will require investment and have researched different funding opportunities, including social investment loan finance, to achieve this.

Our retail offer has slowly begun to recover, with sales reaching around 50% of pre-pandemic levels in line with our visitor numbers. We have introduced a new platform, Shopify, to run both our online and museum shops, which provides us with strong insight into performance, best and worst sellers, customer behaviour and marketing impact. This data will provide us with a strong understanding of the strengths, weaknesses and opportunities for the retail offer. To support this, we have also spent time developing stronger financial understanding with a new profit and loss model to inform future direction.

The museum appointed a new café partner in early 2021, which will contribute positively to the visitor experience and trading income. [Open Kitchen](#) is a social enterprise which focuses on making tasty, affordable food from produce which would otherwise be wasted as part of existing food systems. In addition to their core offer in the café space, Open Kitchen have also been working in partnership with PHM to offer catering to events including weddings. We have worked in partnership to review our processes to maximise efficiency and create a seamless customer offer.

Our future direction

In 2022/23, we are not seeking to replicate the business as it was pre-pandemic, but to shift our business model to meet the changed marketplace that has emerged. We have identified opportunities to evolve our business model in order to achieve sustainable growth by:

- Increasing the proportion of commercial income we generate to reduce our reliance on grant funding, and to fund our social purpose, ensuring our campaigning and activist work remains impartial and true to our values.
- Creating an ethos of social enterprise right across the organisation, where our social impact and ethos is a key differential in the marketplace, particularly for our events and venue hire.
- Establishing the Events@PHM offer as Manchester's ethical events space, with a high quality events offer which creates social impact and a high quality wedding venue with a difference.

To support our ambitions, we will focus on:

Data-led decision making

We will utilise our data from sales, customer insight and financial performance to drive decision-making across venue hire and retail streams, particularly in segregating our offers for different customer types, for example refining our products and marketing messages for museum vs online shoppers. We will analyse financial performance and customer feedback to have a greater understanding of what's working and which areas of growth and innovation might be most profitable and aligned with PHM.

Exploring Social Investment

We recognise the need to invest in our spaces and staff in order to create the high quality ethical events offer our customers are looking for. To achieve this, we will explore different investment opportunities, including social investment finance, as an alternative to grant funding.

Our approach to social investment will focus on our ambition to:

- Create a clear and attractive marketing offer for Events@PHM as an ethical events venue
- Create bespoke offer for weddings at PHM
- Increase skills and confidence of team in sales skills
- Make improvements to our space and facilities to offer a high quality venue
- Improve our ability to adapt to meet demand for events as an inclusive and accessible venue
- Review the business model of the conservation studio, to increase the number of external commissions to raise more income to support the costs of internal conservation work

Active Marketing

We are fortunate to have a loyal customer base who continue to support PHM through regular donations and our trading activities and we want to retain them and thank them for their support. We will launch a quarterly e-bulletin with tailored content specifically for our supporters, with exclusive content and opportunities to get closer to our work. In growing and retaining this pool of people, we will have an effective network of valued future audience and customers.

We will also launch new marketing materials focussed around our profit for purpose offering as a way to grow our customer base and attract new clients. Working in partnership with Open Kitchen, we will design new materials which set us apart as Manchester's ethical events space. This will also offer opportunity for upselling by tagging on behind the scenes access, talks and tours from our expert team to create something unique for our clients, which also generates additional income. We will work to develop our networks to tap into new customer groups and be really proactive about driving forward our reputation as a venue of choice.

PRIORITY 1: Access and inclusion

(INVESTMENT PRINCIPLE: Inclusivity and Relevance)

Our ambition

We will live our vision of a fairer society by further deepening the museum's commitment to equality, diversity and inclusion. Our 'Nothing About Us Without Us' project will be central to raising the bar and embedding access at the heart of our work. This will be the springboard for an ongoing journey of striving to be the most accessible and inclusive physical, sensory and digital museum we can be.

Our current position

Access and inclusion have always been at the heart of PHM's collections and work, with a wide range of campaigns represented across the museum's histories and stories. PHM always takes an intersectional approach to inclusion when working with and showcasing certain themes, issues, communities and campaigns.

Recent and current programme and engagement themes are fundamentally about an accessible and inclusive approach, with [Migration](#) in 2021 and [Nothing About Us Without Us](#) in 2022-23.

Each SLT member has taken a lead on one of the priority areas. Working groups have been set up with every staff member a participant in one of the priority area working groups alongside a selection of trustees. The Priority 1: Access and Inclusion Working Group is being led by the Head of Collections and Engagement.

At an organisational level, the museum has an Equality, Diversity and Inclusion (EDI) Action Plan in place which covers 5 areas:

- Collections, content and programmes
- Audiences and communities
- Workforce and the organisation
- Commercial and fundraising
- Governance and leadership

An EDI working group was set up in 2020 in response to the Black Lives Matter movement. This working group stalled during 2021 largely due to changes in SLT members, the ongoing covid-19 pandemic and the scope of the EDI Action Plan being too ambitious for the capacity of the team. Since Autumn 2021, two members of the team have been participating in the Museum Development 'Equity in Museums' programme. Through this programme, the team has been reviewing and refining the EDI Action Plan and developing its approach to decolonisation.

Our future direction

Looking ahead, the museum is passionate about continuing to play a leading role for access and inclusion in the sector and extending the positive change and impact it has seen at a programme level to the whole museum. A revised, realistic and reinvigorated EDI Action Plan will be implemented from April 2022 and working group members will lead the development and delivery of this work and ensure measurement and reporting of progress.

Through the NAUWU programme, we will reflect and review internal structures and processes, in particular with regard to diversity of recruitment and governance through consultation with disabled people and disabled people's organisations.

Trustees, staff, freelancers and volunteers will understand what the social model of disability is and what they can do to make PHM a more welcoming and accessible organisation for disabled people as visitors and employees; this will be achieved via across the board Disability Action Training provided by Greater Manchester Coalition of Disabled People. Other training for relevant members of the team will include:

- Deaf awareness (provided by Manchester Deaf Centre)
- Audio description (provided by VocalEyes)
- Making information accessible (provided by Change)
- Introduction to neurodiversity (Provided by Starling)

- Visual awareness (Provided by VocalEyes)
- Web and social media content accessibility for blind and visually impaired visitors (provided by VocalEyes)

PHM will also:

- Implement a range of access improvements identified in an access audit of all public spaces and workspaces conducted by Manchester Disabled People's Access Group. Subject to successful funding bids, this will include a new changing places toilet, modifications to lifts and doors, and new manifestations on glass panels
- Create a set of standards for digital content which include accessibility requirements
- Explore joining the Disability Confident employer scheme

PHM will also focus on the Workforce and Organisation and Governance and Leadership areas of the EDI Action Plan with a commitment to creating opportunities for the communities PHM engages with to be included and represented in our workforce, leadership and governance structures. This will include action to diversify the Board of Trustees with new appointments, scoping how a community advisory panel could work for the entire museum (rather than just for specific projects). As well as continuing to develop and take new approaches to recruitment, as was begun in 2021-22 for the recruitment of various Assistant level posts, to diversify both PHM's team and the museum sector. A workforce development policy will be created and implemented putting access and inclusion at the heart of all future recruitment.

PRIORITY 2: Environmental action

(INVESTMENT PRINCIPLE: Environmental Responsibility)

Our ambition

We are committed to taking responsibility for the environment and we recognise that this goes beyond a commitment to embedding sustainable practices in our day-to-day operations and reducing our carbon footprint. We must prioritise environmental thinking in everything we do and use our voice and our platform to encourage others to respond to the climate crisis. We will use our stories of environmental activism to be an advocate for the environment, inspiring people to use their voices and actions for greater environmental justice.

We are working towards achieving net zero carbon emissions by 2038 in line with Greater Manchester targets. Education is key to this, and we will ensure that carbon literacy and sustainability knowledge is embedded within teams across the organisation.

Our environmental commitments will guide both our day-to-day operations and our role in the community. We will treat social, economic and environmental goals as interdependent and co-beneficiary.

Our current position

PHM's collection already features objects related to environmental activism and the climate crisis and this has been a focus of contemporary collecting work in recent years. In 2019, the museum's Protest Lab became a place for people to share details of the campaigning in this area and PHM was able to engage people in debate, discussion and activity on the environment.

Each SLT member has taken a lead on one of the priority areas. Working groups have been set up with every staff member a participant in one of the priority area working groups alongside a selection of trustees. The Priority 2: Environmental Action Working Group is being led by the Head of Finance and Operations.

Over the last decade, the museum has also taken responsibility for its own environmental impact as an organisation and public building, with a range of actions and measures including:

- Training for staff, including carbon literacy
- Recycling schemes for both staff and visitors
- Building improvements to reduce energy use and waste
- Collaboration with local networks (including Greater Manchester Arts Sustainability Team – GMAST), focused on knowledge-sharing and collaboration across Greater Manchester's cultural sector
- Improvement of digital systems and processes to reduce use of paper
- Reporting environmental impact information to Julie's Bicycle as an NPO
- Participation in the Business Growth Hub's Journey to Net Zero programme, which provides the skills and resources to enable PHM as an organisation to accurately understand, quantify, and take meaningful, practical steps to address its carbon footprint
- Participation in Museum Development North-West's Roots and Branches project, with the Head of Finance & Operations undertaking Carbon Literacy certification with a view to becoming a trained provider of Carbon Literacy training to PHM staff and other partners
- Establishment of an interdisciplinary staff working group focussed on understanding PHM's environmental impact, driving change, and developing PHM's ability to act as an advocate for the environment to its audiences, partners, and supply chain

Our future direction

In the coming year, PHM will continue to iteratively review and update its **Environmental Responsibility Strategy and Action Plan**, setting clearer and measurable targets to achieve and demonstrate impact. This will cover PHM's role as an Activist Museum advocating for change and engaging people in debate and action, as well as its commitment to its own environmental journey to net zero.

PHM will:

- Calculate its own carbon footprint to establish an organisational baseline and set ambitious targets with achievable milestones (including an action plan for future capital improvements to be made to the museum building)
- Establish clear structures and practices for ongoing monitoring of our environmental impact and progress towards targets, including creating a carbon budget against which consumption of resources can be formally monitored
- Continue contemporary collecting around environmental action and climate crisis
- Provide further training for all staff on environmental impact and carbon literacy, such that all staff have received at least a foundational level of carbon literacy training and sustainability is embedded in organisational mindset and behavioural practices
- Drive forward the internal working group of staff, volunteers and others to provide internal thought leadership, direct action and modelling of best practice, to take a lead in delivering the Environmental Action Plan
- A commitment from the PHM team to support and improve the environment of its local area, including litter picking, recycling services, green transport links and exploring opportunities for rewilding and other positive environmental interventions
- Concrete, direct actions to make the museum more efficient and reduce its carbon footprint, such as changes to lighting, a significant reduction in paper-based working practices, and a review of our supply chain to eliminate suppliers whose views and practices do not align with our environmental commitments
- Audience engagement work prioritising activity with children and young people

PHM has also entered a new and exciting partnership with [Open Kitchen](#) in 2021 which has become the museum's café and catering provider. Open Kitchen is Manchester's leading sustainable catering company with a passion and commitment for conscious catering, fighting food waste and supporting local communities. Open Kitchen at People's History Museum will be the first museum cafe and bar in the country that intercepts food that would otherwise go to waste.

PRIORITY 3: Digital transformation

(INVESTMENT PRINCIPLE: Dynamism)

Our ambition

PHM will achieve its vision by fully embracing digital to shape audience experiences and help inspire positive action. We will reach over a million people a year through our web, social media and digital channels. From online exchange to hybrid events and live-stream learning activities, we will use digital technology to engage, connect and inspire audiences. We recognise the value in online experiences and believe our audiences may never need to visit our building to be inspired to take positive action, though of course they will want to! Digital transformation will enhance and deepen audience journeys and will become equal in importance and value to our physical museum experience.

Our current position

Almost overnight, the pandemic forced digital change and adoption at PHM, with significant progress in embracing digital technology, experimenting with platforms and upgrading hardware, though the museum is not yet fully cloud-based. The museum must build upon the enthusiasm and momentum of the past two years to continue the pace towards fully embedding digital at PHM. Through an Art Fund grant, Respond and Reimagine, we have developed our digital capability. We have upgraded our equipment to include better venue hire facilities to enable hybrid meetings, upgraded our mini-theatre so we can include a digital offer, we have tested hybrid formats for our programme of Lates and popular Fabric of Protest workshops to understand what types of event work best for audiences, and have invested in IT equipment for our team to enable more agile working. In addition to infrastructure, we have prioritised building the skills and confidence of our team through bespoke training on designing, delivering and troubleshooting live-streamed events.

Each SLT member has taken a lead on one of the priority areas. Working groups have been set up with every staff member a participant in one of the priority area working groups alongside a selection of trustees. The Priority 3: Digital Transformation Working Group is being led by the Head of Development.

Our future direction

PHM will embrace transformational technological change and has developed and enhanced opportunities and experiences to enable an ever-increasing audience to access and enjoy the museum online. Digital will be a core way for PHM to operate, shaping engagement, communication, systems, stories, our structure and infrastructure. PHM will reimagine its online and hybrid offer, delivering high quality experiences and video content, fully implement and maximise opportunities via its CRM and explore DAMS solutions.

The principles for digital transformation at PHM are:

- We recognize that audiences can be different across digital and physical – and all engagement is valuable. Digital can be the start or total of a journey
- We want to stand out in the digital crowd by doing something different to others
- We want to create a digital space which offers space for social interaction, contributing, critical thinking and reflection – not just putting content out but engaging with our audience
- Our digital offer will not just replicate the physical space but offer something different and complementary. We will explore how we can create online only events, campaigns and content
- We will set the standards for PHM digital engagement – focus on access, conversational tone and quality content
- We will think about how digital can provide opportunity for deeper relationships with audiences – offering behind the scenes content
- We will be data-led in our decisions, using data for governance and ensuring we include measurement in everything we do

PRIORITY 4: Investing in the future

(INVESTMENT PRINCIPLE: Ambition & Quality)

Our ambition

We will invest in and develop our high-performing team to deliver our vision and achieve our aims and ambitions. Investment in our organisation will include clearly defined roles and responsibilities, a culture of giving and receiving feedback, and a performance management system with SMART objectives to drive success. Regularly updated policies and systems will improve the way we work, as we build on the advantages of flexible and agile working to ensure that the team can work effectively together on strategic, creative and cultural priorities.

We will continue to collaborate with communities and include and represent them within our workforce, leadership and governance structures. Our organisational culture will continue to be an inclusive and safe workplace for everyone. We will continue to actively challenge and reshape our recruitment processes to make them more accessible and inclusive.

Our current position

PHM has a strong and close-knit staff team who are all passionate about the museum's work. The organisation is people-focussed and the team are excellent at working with visitors and partners. The museum receives lots of positive feedback on the quality of its customer service and the skills, expertise and friendliness of the staff team.

The current organisational structure is relatively flat with a senior leadership team of four members (including the Director) and a number of small teams of staff working within larger departments. Individuals and teams are delivering a wide range of services and activities for the size of the organisation. Staff are the museum's biggest asset, and biggest cost, and it is therefore essential for the museum to invest in the team and to maximise its people resource to achieve the aims and priorities in this Business Plan.

The museum has a [Board of Trustees](#) (currently 12 members in February 2022) with local and national representatives who bring a mix of skills and expertise. The museum has nominated representatives from GMCA, Manchester City Council and the TUC. The museum has recruited Trustees with specific skills and backgrounds to support in key areas, including accounting and finance, legal, brand and marketing, union connections and politics and government.

Each SLT member has taken a lead on one of the priority areas. Working groups have been set up with every staff member a participant in one of the priority area working groups alongside a selection of trustees. The Priority 4: Investing in the Future Working Group is being led by the Director.

Our future direction

Looking ahead, PHM is going to face further challenges as we continue to recover from the pandemic, and if the museum is going to progress its vision and achieve its ambition, it will be essential for the whole team to be high-performing and working together to ensure success. This will include the staff team, the Board of Trustees, volunteers, freelancers and community curators / teams.

PHM will invest in:

- A holistic review of the organisations structure, ensuring the right resources and skills are in place to deliver the ambitions in this business plan. PHM commissioned an external piece of consultancy work in 2021 to review the structure, culture, behaviours and staff salaries / package with a final report due in March 2022 to include recommendations for implementation within the life of this Business Plan
- SMART objectives which cascade from the Business Plan Action Plan (Appendix 2) with aims flowing into departmental / team objectives and to individual targets which will be set annually and monitored every 6 months
- A new performance management system for all staff which is clearly focused around the Business Plan aims; giving staff the opportunity to shape how they will help to achieve the museum's vision
- A management dashboard collecting agreed data across the organisation linked to Business Plan aims for the leadership team to review monthly and Trustees quarterly

- A culture of feedback, where everyone is confident and comfortable asking for and receiving feedback to improve performance (including 1-2-1s between the Chair and Trustees, including 360 reviews and regular peer review)
- A policy review to update all HR and staff policies across the museum
- A workforce development policy putting access and inclusion at the heart of all future recruitment
- Support and guidelines for ongoing hybrid working (as part of a flexible working policy) to set high standards of collaboration and communication and provide training where needed
- Training and development aligned to the aims of the Business Plan, including access and inclusion, impact measurement, financial literacy and enterprise, and digital skills
- Investment in the museum's workforce with Living Wage accreditation secured in 2021 and membership of the Greater Manchester Good Employment Charter to be secured in 2022 (including café staff)
- Support and training across the team for their mental health and wellbeing (especially in response to the impact of Covid-19) with mental health first aid training for key staff and a range of measures and activities delivered by the team for peer support
- Playing an active role in making PHM and the wider sector more diverse. This will involve reviewing our approach to volunteering and placement opportunities as well as recruiting apprentices and improving our wider recruitment practices

There will also be governance changes to be implemented in 2022/23, following the appointment of our new Chair of Trustees (Bernard Donoghue), who is keen to review the effectiveness of the current Board and to make changes as required to ensure all Trustees are helping to progress the museum's vision and achieve its ambition for the future.

Trustees in the coming year will focus on:

- PHM strategy and business planning (aligned with the priorities and investment principles of main funders and stakeholders)
- Recovery from the pandemic, financial security and enterprise activity
- Risk management with a new risk register for scrutiny by the Audit and Risk Committee
- Openly advertising for a number of new Trustees with a commitment to improving diversity and representing the communities the museum engages with through its work

Partnerships will continue to be incredibly important to PHM and the senior leadership team will focus on a smaller number of strategic partnerships which will support delivery of the new vision under the 4 aims outlined above. The museum will focus on collaboration with partners where there are key strategic outcomes and benefits for both – with PHM supporting partners with access to collections and content to support their work and campaigns, and with partners providing the museum with connections to policy development, campaigning and community links.

Collaborating and co-creating with communities will continue to be fundamental to PHM's future and to delivery of its vision and mission. The museum already has a strong track record of engaging communities in programming and providing a range of opportunities for community members through steering groups and paid community curator / programme roles. Looking ahead, PHM will research models and methodology to ensure community input into wider discussions, developments and decision-making across the museum. This will better connect the museum's collaborative and co-created approach to content and programming with governance, leadership and strategic planning in new and creative ways.

Diversifying recruitment practice and process will also continue, following work that began in Summer 2021 with the recruitment process for a new Collections Assistant role, where unnecessary qualification requirements and criteria were removed, and we provided questions in advance of interviews. Every time we recruit a new member to the team, we will evaluate and reshape our processes as we strive to play an active role in making the sector more accessible and diverse.

4. Our finances

The museum is a Registered Charity (295260) and Limited Company (2041438) and has an external annual audit of its consolidated accounts (including the subsidiary trading company), copies of which are available on request. There is an Audit and Risk sub-committee of the Board of Trustees (chaired by a chartered accountant and Partner in their firm) which monitors all financial information and reports to the main Board quarterly.

This Business Plan includes a budget for 2022-23 (below) which has been scrutinised and approved by the museum's Audit and Risk Committee and the Board of Trustees.

Budget assumptions

The following information has been used to create the budget for 2022/23:

- PHM reopened in May 2021 following the lifting of lockdown restrictions and has remained open since then. In line with what we have seen of visitor behaviour since reopening, the budget has been prepared on a prudent basis, assuming visitor numbers and activities will increase over FY22 and into FY23 but remain at relatively subdued levels in comparison with pre-pandemic years. It assumes modest increases in visitor numbers and related donations, but without returning to pre-pandemic levels of footfall, trading income or donation income within the 2022/3 financial year
- PHM used the furlough scheme for as long as it remained appropriate to do so, with all staff returning to work in May 2021. The budget assumes no further closures due to Covid-19 restrictions and therefore all staff will work their full contracted hours
- Some grant income was secured prior to 2021 for delivery of programmes and projects that were delayed due to the pandemic. All funders agreed to this work being delivered in 2021/22 and work has been delivered in accordance with this revised timeline. All work funded by grant income received prior to 2021 has been delivered by the end of FY22, although some of the projects to which this funding related, including a Designation Development Fund project to digitise PHM's poster collection, will continue into FY22/23 with further tranches of funding being drawn down
- Approximately £130k of National Lottery Heritage Fund funding has been secured towards the costs of PHM's 2022/23 programme, Nothing About Us Without Us. Limited further funding has also been secured from the Garfield Weston Foundation (£30k towards programme costs) and the Foyle Foundation (£25k towards capital projects), but a shortfall of c.£60k, largely relating to staff costs we were hoping to recover, will need to be funded out of PHM's unrestricted income
- Largely as a result of the forecast shortfall in trading income in FY22/23 relative to pre-pandemic years and the recent increases in utility costs, we are currently forecasting a budget shortfall for FY23 of c.£100K

Reserves (update February 2022)

Unrestricted reserves at the end of the FY20/21 financial year were £173,832. Due to careful control of costs and the receipt of Covid support from several of our key funding providers in FY22, we have been able to reduce the previously forecast budget deficit for FY22, with income covering 98% of expenditure in the year to date (against a budget for the full year of 91%). Thanks to our successful application to Cultural Recovery Fund 2, which resulted in a grant of c.£173k towards replenishment of reserves, we currently estimate PHM's unrestricted reserves to be in the region of c.£250K, and therefore sufficient to cover the budget deficit for FY23 of c.£100K if no further income is secured.

2022-2023 Budget

Income

Grants - restricted

Migration	£36,000
Nothing About Us Without Us	£158,489
Arts Council Designation Development Fund poster project	£32,336
Other restricted grants and donations	£30,000
Total restricted income	£256,825

Grants - unrestricted

Greater Manchester Combined Authority	£408,970
Arts Council England National Portfolio Org.	£322,000
Other	£20,000
Total unrestricted grant income	£750,970

Trusts, donations and charitable activities

Sponsorship income	£30,000
Donations	£100,000
Collections & Engagement income	£41,700
Other non-trading income	£26,125
Total trusts, donations and charitable activities	£197,825

Profit available to museum from trading activities

Income from trading activities	£108,000
Social enterprise funds	£45,000

Total income

£1,358,620

Expenditure

Grant expenditure - restricted

Nothing About Us Without Us	£112,315
Arts Council Designation Development Fund poster project	£18,445
Total restricted expenditure	£130,760

Unrestricted expenditure

Fundraising

Marketing	£25,000
Trading costs funded by PHM	£3,000

Charitable activities

Learning & engagement	£12,000
Main galleries, archive & conservation	£11,000

Operations and governance

Staff costs	£989,664
Property & utilities	£201,500
Recruitment & training	£5,000
Statutory and legal costs	£34,000
Other administrative costs	£10,100
Social enterprise loan expenditure & repayments	£53,980
Total unrestricted expenditure	£1,345,244

Total expenditure

£1,476,004

Net income/(expenditure)

- £117,384

Appendices

1. Monitoring and evaluation plan
2. Activity plan
3. Risk register
4. Strategic fit
5. Investment principles plan
6. Staff structure
7. Trustee biographies

1. Monitoring and evaluation plan

Evaluation is important to the museum in informing the future development, production, programming, curating and distribution of work. It is an essential part of the museum's understanding of how audiences and participants are experiencing activities and the impact that they are having on individuals and groups. It is also how the museum thinks about itself and its achievements and how it compares with other similar organisations.

During the life of this Business Plan, PHM is committing to taking a more focussed approach to impact-led engagement and to thinking more carefully about articulating and measuring the difference the museum wants to achieve through its work.

In 2022/23, PHM will be clear about the impact it makes through its ambitious, high-quality work and will be able to measure and evidence the difference the museum makes to the world.

This will include:

- Agreeing clear outcomes and SMART targets which will provide evidence of the action that people take as a result of engaging with the museum
- Reviewing demographic data to set a new baseline for who is currently engaging with PHM and what future targets will be as part of the Equality, Diversity and Inclusion Action Plan
- Reviewing the current Audience Development Plan to agree future outcomes and targets for more, different and deeper engagement
- Exploring different audience journeys to recognise the different levels of engagement taking place and the value they have
- Ongoing use of existing tools (Audience Finder and Impact and Insight) as part of a consistent evaluation methodology across PHM's work

The museum will also take an accessible approach to evaluation and impact measurement as part of its Nothing About Us Without Us programme in 2022/23. With a programme focused on disabled people's rights and activism, it will be fundamental for PHM's evaluation tools and practices to be as accessible as possible. The team will be working with disabled people to develop and implement evaluation processes. This will include anyone who identifies as a disabled person, such as (but not exclusively) deaf, autistic, neurodiverse, learning disabled people, people with first hand lived experience of mental illness, chronic illness and fatigue and service users/survivors of mental distress; movements, communities and individuals.

Impact and Insight Toolkit

PHM is committed to using the Arts Council's **Impact and Insight Toolkit** for all of these reasons. The toolkit helps improve the museum's understanding of how the quality of its work is perceived by others, how this aligns with the museum's own creative intentions and how the museum compares through benchmarking, sharing findings, and peer reviews with other NPOs.

The museum will use the Toolkit to evaluate a minimum of **four events, exhibitions or performances** each year. It will also use the digital quality evaluation platform to collect survey responses to the quality metrics from audiences, peers and relevant staff within the museum.

Each evaluation will include:

- One pre-event quality evaluation survey from a relevant member of staff outlining the creative intentions of the work
- One post event quality evaluation survey completed by a relevant member of staff
- One post event quality evaluation survey completed by a relevant peer
- Post event quality evaluation surveys from multiple audience members (aiming for a minimum of 10% of the audience and trying to achieve representative samples)

The museum will provide a simple report of each evaluation to its Relationship Manager within one month of completion, as well as an annual report summarising all evaluations by the end of June 2023. PHM will also share findings from each evaluation with Trustees at quarterly Board Meetings.

The museum also commits to a member of the team completing a minimum of four peer reviews for other NPO organisations each year (if requested) and to completing a peer quality evaluation survey within one week of attending an event, performance or exhibition.

Audience Finder

PHM is an experienced user of the **Audience Finder** data-insight and support platform and has used the platform to capture audience data for a number of years. The museum will continue to collect data from audiences in 2022/23 and will upload a representative sample of data to the platform, and submit an enhanced annual summary report in July 2023 including details about the protected characteristics of our audiences.

Audience data will feed into the museum's performance management dashboard and will be reported to Trustees at quarterly Board Meetings.

2. Activity plan 2022-23

Aim 1: Impact Led Engagement												
Objective	To collaborate with communities			To understand and measure our impact <i>Also see monitoring and evaluation plan</i>			To take a blended approach to engagement			To work with children and young people		
Project / Service / Work Programme	A) Continuing to offer and evaluate paid creative opportunities and roles adding lived experience to PHM	B) Continuing to develop, run and evaluate a range of steering groups, panels and other forums for collaboration	C) Committing to understanding and addressing the power imbalances when working with communities	A) Collecting and reporting demographic data to create a baseline for engagement and setting clear EDI targets	B) Creating data and evidence to measure the action that people take after engaging with PHM	C) Increasing awareness and understanding of the social model of disability through NAUWU programme	A) Placing excellent customer service and the visitor experience at the heart of the museum - with a focus on access and inclusion (linked to NAUWU)	B) Programme delivery for NAUWU using onsite, online and hybrid models for events and engagement	C) Embedding our approach to using digital technology for engagement and events where appropriate	A) Research and consultation with staff, freelancers, schools, partners and communities on PHM's learning programme	B) Testing and evaluation of current learning programme for all audiences (including children and young people)	C) Development of new / revised learning programme closely connected to PHM vision and mission
	Nothing About Us Without Us (NAUWU) delivery in 2022/23 – working with a Steering Group and 4 paid Community Curators on programme exploring disabled people's rights and activism – see NAUWU project plan									Learning Review project delivered in 2022/23 to align work with, by and for children and young people (and other audiences) with PHM's vision and mission		
Tasks	1) Supporting and developing the NAUWU Community Curators x 4	1) Supporting and developing the NAUWU Steering Group (monthly meetings)	1) Sharing learning from current community collaboration models to develop future	1) Establishing a staff working group for audience data – capturing baseline data and	1) Defining tools PHM can use to measure action taken by visitors	1) NAUWU exhibition design brief to include content explaining the social model of disability	1) Supporting VE team as advocates for NAUWU and access improvements and	1) Planning and delivery of 4 NAUWU headline events in a timely manner - with each event to include:	1) Digital events as part of NAUWU programme – working with Steering Group to plan	1) Consultation plan with schools, partners and communities – evaluation	1) Testing learning services with a variety of audiences (current and future)	1) Developing clear aims and objectives for learning service 2) Training for staff and freelancers

	2) Completing Migration evaluation with the Community Programme Team x 5	and evaluation)	opportunities at PHM 2) Reviewing our approach to Community Exhibitions in 2022/23 based on past experience and programme aims	agreeing evaluation tools for 2022/23 2) Using NAUWU evaluation to share baseline data on disability and set targets for 2022/23	2) Including up to 3 elements within the NAUWU exhibition design where people can take action	2) Staff, and trustee training delivered through GMCDP Disability Action training 3) All Communications about NAUWU to include the social model of disability	services offered 2) Providing training for all staff and information on NAUWU for enquiries 3) Implementing Access Audit recommendations across visitor experience and building	- Target audience - Method of delivery - Standard access services and facilities - Engagement standards	2) Agree and share engagement / Access standards for online events 3) Continued staff training and development for digital and hybrid events	of current services – identifying need 2) Review of business model including freelance contracts and pay		3) Developing business model with income targets
Performance indicators	Community Curators gain skills, experience and wellbeing outcomes over the course of the year x 4 individual evaluations and case studies Migration evaluation	Steering group meets 12 times during the year 2022/23 Steering group feels empowered to make decisions and influence change at PHM - evaluating their experience –	3 members of steering group / CC continue to engage with PHM to shape future collaborations and models for whole museum community advisory panel At least one CC shares	Working Group established and meets 4 times Action Plan created for audience data and feedback by Jan 2023 Increase no of disabled people visiting	PHM tests and agrees 3 tools for measuring impact in 2022/23 NAUWU evaluation of up to 3 elements where people are encouraged to take action as part of exhibition	Content about the social model is shared on social channels and monitored on Marketing dashboard from July 2022 – March 2023 Staff and trustee feedback from training shows increased understanding of the	TripAdvisor reviews mentioning NAUWU or access improvements / services (July 2022 – March 2023) Social media comments mentioning NAUWU or access improvements / services	4 NAUWU events delivered during exhibition run Each event has specific agreed targets for: - Capacity and no of participant - access provision pre, post and during event - Demographic data of	Staff confidence in delivering digital events improves Each digital event has agreed targets for: - Capacity and no of participant - access provision pre, post and during event - Demographic data of who is attending	Number and range of people involved in consultation is agreed at start of process and recorded Evidence captured during consultation activities – notes from sessions, visual minutes, capturing	Evaluation of each test / pilot session using: - Observation - Teacher / Group leader feedback - Participant feedback - Staff feedback - Artist / freelance feedback	Manifesto for learning created and shared by March 2023 Number of training sessions with staff and freelancers x 20 Clear income targets set for learning programme roll out from 2023 (linked to future budget setting)

	ns report complete d by May 2022	case studies and blogs	their experienc es of working with PHM at a sector conferenc e or workshop Plan developed for future communit y exhibitions by March 2023	with baseline informatio n collected in 2022 and targets set with steering group for future improvement	n evaluatio n	social model from 95% of staff	VAQAS score is maintained / secret shopper feedback references access services 2 peer reviews completed during NAUWU exhibition run)	who is attending - Quality impact achieved - Donations / ticket income received	- Quality impact achieved - Donations / ticket income received	content and ideas		
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Note: This Business Plan Aim aligns with the museum's Engagement Strategy

Note: This Business Plan Aim is also closely connected to the existing work programme and delivery plan for PHM's engagement / programme theme in 2022/23: Nothing About Us Without Us

Aim 2: Celebrating our Stories

Objective	To audit and understand the collection			To decolonise the museum			To review and implement new digital systems, IP rights and records management			To take a strategic approach to acquisitions and contemporary collecting		
Project / Service / Work Programme	A) Auditing existing material covering disabled people's rights and activism as part of NAUWU	B) Auditing the poster collection as part of the DDF project (with images to add to the new DAMS system)	C) Researching the collection for potential future Environmental action programme theme	A) Building on the Migration programme theme to establish its legacy across PHM	B) Developing an action plan from the audit of the museum's main galleries and displays for decolonisation	C) Feeding into future capital redevelopment plans for PHM (including main gallery redisplay)	A) Digital Asset Management System (DAMS) purchase and implementation, with audit of current collections assets for migration onto the DAMS	B) Improvement of search functions on PHM website for public and partner research	C) Improvement of IPR management and data protection across the team	A) Reviewing acquisitions process and practice ahead of Accreditation submission	B) Building capacity and skills for a rapid response approach which will enable contemporary collecting in response to national stories and events	C) Apply for funding to democratise the collection through stronger community links and diversifying the sources of our collections
Tasks	1) Staff supporting Community Curators to understand collection and select items for exhibition 2) Improving knowledge and	1) Delivery of the DDF workplan 2) Cataloguing and digitising 4-5000 posters by February 2023 3) Improving understanding of	1) Auditing the existing collection for content related to Environmental action	1) Agree a home for the Migration timeline in the museum as a legacy item (physical and digital) 2) Make improvements to main galleries to enable Migration	1) Develop an Action Plan to include: - Consultation with communities - Trigger warnings where needed - Updated text and labels - Additional content	1) Research and action plan to feed into Trustee and SLT conversations about future capital redevelopment plans	1) DAMS implementation – new system purchased and introduced (launching with 250 posters) 2) Workflows created for DAMS system to add more assets in batches over time	1) Remove archive data from front end of system (search the collections becomes object collection only) 2) Redevelop Archive webpage to signpost to external online archive catalogues	1) Setting up systems for IP rights 2) Upskilling the team to understand the traffic light system for IP risk 3) Identifying images from poster collection for potential licensing and retail 4) Renegotiating	1) Collections Moratorium – pausing collecting in 2022 to address backlog and enable other work in this Aim 2) Review of policies and procedures with updated Collections	1) Approach to be developed as part of Collections Development Policy 2) Ensure links between collecting plans and campaigning work (see Aim 3)	1) Submit application to Esmée Fairbairn Collections Fund (September 2022 / December 2022) 2) Submit application to NLHF collections funding or other funding routes 3) Explore partnership

	tagging of existing collection related to disability rights	IP across the poster collection		content to continue to be shared with visitors	- Removal of objects or content - Addition of new objects or content - Staff training		3) Roll out of DAMS across PHM –eg. Comms and Retail team have access to collections assets		g contracts with bailments within the Archive and museum 5) Data protection audit of the Archive collection	Developm ent Policy		with Fast Familiar to utilise the acquisitions panel immersive idea
Performanc e indicators	Number of PHM collections exhibited as part of NAUWU – agreed with Community Curators and Steering Group More items identified on searches tagged under 'disability'	4-5000 posters catalogued 3000 images digitised and uploaded to DAM system	More items identified on searches tagged under 'environment'	Physical timeline on display in PHM in 2022 (digital version TBC) Migration content remains on display within main galleries Migration content is shared with partners (eg. HOME partnership)	Short term actions are implemented in 2022/23 (low cost and time specific) eg. Removing material / adding trigger warnings Medium term plans agreed and developed into funding bids for work	Long term plans discussed by SLT and Trustees as part of masterplan for PHM capital project	250 posters on DAMS for launch 3000 posters on the DAMS by March 2023 6 Staff outside of collections team with access to DAMS	Archive collection removed from search the collection by December 2022 Archive webpage updated by December 2022	10 staff trained on using IP systems New contracts are drawn up and signed for two main bailments within archive and museum collection within 2022/23	Collections Development Policy presented to Trustees (Feb 2023) Accreditation return submitted (time TBC)	Rapid Response approach is included in Collections Development Policy (by Feb 2023)	Application submitted for funding December 2022 Other funding applications made (see Fundraising Strategy and pipeline)

Note: This Business Plan Aim will also align with the museum's next Accreditation return (expected to be due in 2022/23)

Aim 3: Bold Profile and Brand

Objective	To take a strategic approach to communications – improving internal collaboration and cross working			To utilise data more effectively for marketing and communications			To raise our profile and position as an Activist Museum		
Project / Service / Work Programme	A) Communications and Marketing Strategy developed and rolled out in collaboration with wider team to compliment and add to engagement strategy	B) Improving cross organisational working to maximise engagement impact on audiences / income / profile Amplifying Aims 1 and 2 through Aim 3	C) Link our new marketing strategy and campaigning work into our approach to PR – being clear about the opportunities we resource to complement our strategic approach	A) Marketing dashboard is created, tested and rolled out – sharing data internally with staff as well as with Trustees, funders and stakeholders	B) Testing and evaluating different content and approaches on social media channels for audiences for social interaction, contributing, critical thinking and reflection	C) CRM system developed further for audience segmentation, audience journeys and tailored communications - creating a pipeline of engagement with PHM	A) Staff training and development to support them to engage audiences with campaigning issues (with support from the Activist Museum Award)	B) Internal and external conversations and consultation on PHM's campaigning role as an Activist Museum	C) PHM support for issues and campaigns connected to NAUWU and disabled people's rights as part of programme focus in 2022/23
Tasks	1) Board engagement – workshop session – agreeing the priorities for the strategy 2) Team engagement - workshop to discuss the content of the strategy with a particular focus on connecting engagement and marketing 3) Development of the strategy with	1) Creating a single shared calendar of comms and engagement across the whole organisation to include inclusion dates, anniversaries, collection, outreach and PHM events 2) Shared forward planning meetings across the whole team focusing on where to direct	1) Fido PR collaborating in campaigning workshop and strategy sessions to add PR experience and perspective 2) Fido ownership of PR aspects of marketing dashboard, updating data regularly for review and reporting	1) Using the marketing dashboard for SLT planning and board for strategy setting 2) Sharing marketing dashboard with all staff for audience information (onsite and online) to influence design 3) Connecting marketing dashboard with wider PHM	1) Develop content plan across platforms 2) NAUWU content plan considering accessibility needs of audiences 3) Ongoing evaluation of social channels to understand segmentation and impact	1) Growing database to create strong pipelines for comms messaging 2) Create workflows that support layered / tailored messaging for audiences – and enable more automation of messaging 3) Analytics collected and analysed to enable	1) Identifying the training staff need for this area of work 2) Working with a trainer / facilitator / consultant to develop and deliver training (within NAUWU programme plans) 3) Develop ideas for a number of experiments to test and evaluate approaches to	1) Staff and Trustee workshop to discuss future campaigning – why / what / how 2) Work with Richard Sandell and Activist Museum model of campaigning in museums: Legal Curatorial Business Ethical 3) Introduce opportunities at PHM to	1) Work with Steering Group to identify campaign issues focussed around Social model of disability – raising awareness and understanding 2) Scoping current campaigns PHM can support – eg. Supporting new legislation that will make access improvements

	consultation on drafts 4) Launch new strategy – January 2023	resource for maximum impact		performance framework		performance improvement	engaging visitors with campaigns	signpost people to action as a result of engaging with the museum	3) Explore potential to campaign locally e.g. public transport access
Performance indicators	Strategy approved by board at meeting in November 2022 Marketing dashboard in place to monitor impact of communications activity from April 2022	Shared calendar created by May 22 and updated monthly Marketing dashboard in place to measure impact from April 2022 Growth of events audience as a result of changes – measured from April 22 baseline Increased income from events tickets, donations and sales by 40%	Marketing dashboard in place to monitor impact from April 2022 Regular reporting of impact of PR to Board at Quarterly Board Meetings	Marketing dashboard in place to monitor impact from April 2022 Growth of events audience as a result of changes-measured from April 22 baseline Increased income from events tickets, donations and sales by 40%	NAUWU Social Media content plans in place by July 22 Analytics linked to social media collected monthly and added to Marketing dashboard	Growth of audience database from 2500 to 4000 Conversion rate to e-news sign ups and to donors – new measure for this year Click rates on newsletters increase average by 10%	At least 20 staff trained as part of this programme of work Feedback from staff training shows increased confidence in engaging with the public on campaigning issues Testing new ways to engage audiences in our campaigning work are evaluated individually to measure impact Feedback from Activist Museum Award team / mentor / peers is collected	Principles/frame work for campaigning agreed and embedded by July 22 Activist toolkit developed in 2022/23 Analytics are captured and analysed to test different methods of engaging audiences – and added to Marketing dashboard	Campaigns identified with Community Curators and Steering Group by July 2022 (exhibition opening) Action plan developed by cross team working group for each campaign Impact measurement framework in place for evaluation of each campaign

Aim 4: Building financial sustainability

Objective	To make data led decisions to grow commercial income		To maximise opportunities for growth through social investment and other forms of income generation			To take an active approach to marketing for fundraising and income generation		
Project / Service / Work Programme	A) Boosting retail income (onsite and online) through sales information and customer insight to refine products and target marketing for different audiences	B) Utilising improved financial information and reporting to drive decisions on price, profitability and priority areas for investment	A) Using social investment awarded from Access2Growth fund from GMCVO to develop the venue hire and events service at PHM	B) Developing the Textile Conservation Studio business model as a specialised service provided by PHM	C) Reviewing the approach to philanthropy, donations and high level giving to increase income	A) Communication channels dedicated to PHM Supporters and Donors with exclusive content as part of an annual calendar of communication	B) Marketing PHM as Manchester's premier ethical events space (in partnership with Open Kitchen) – investing in the service and focusing on PHM's USP	C) Creating opportunities for cross promotion and upselling across the museum's services with more effective communication to connect across every customer journey
Tasks	1) Develop Online Shop marketing strategy for the year by May 22 2) Test and refine strategies to increase income from onsite shop – events, merchandising, book selling etc 3) Develop and source NAUWU product range and events to connect retail with programme (collaborating with Engagement Team) 4) Test events offer linked to retail with 4 events in 2022/23	1) New finance system in place by April 2022 2) Financial training for staff team rolled out April – June 2022 3) Financial KPIs used to identify future actions across PHM income generation 4) Trading Company Board using financial data to drive strategy and make key decisions on priorities	1) Strategy session with the Trading Company Board to agree priority areas 2) Investment in PHM spaces and facilities using the loan 3) Create bespoke offer for weddings at PHM	1) Understanding potential income streams for development and growth 2) Agreeing areas for development and investment in 2022/23 3) Reviewing prices and benchmarking against peers 4) Investing in business development skills in the team	1) Embedding decision science principles across fundraising materials 2) Growing supporters across all tiers 3) Engage new and repeat High level donors– with Trustees involvement	1) Quarterly bulletin for supporters shared using CRM mailing list 2) CRM analytics collected and analysed to show engagement 3) Annual event for supporters introduced in 2022/23	1) Creating a clear and attractive marketing offer for Events@PHM as an ethical events venue. 2) Developing new marketing channels to reach out to new customer groups	1) Staff training and development – sharing information on upselling and cross promotion 2) Slide deck created for all events and activities to promote other engagement and donation opportunities 3) Joint approach to events programme with focus on income generation

Performance indicators	Growing spend per visitor from average of £1.30 to £1.50	KPI framework for retail and venue hire developed in Q1 of 2022/23 linked to new finance system	Building net profit back to 2019.20 levels – but in a different market (see 2019/20 accounts)	Increase in self generated income from TCS from £40k as baseline	Income from Join the Radicals scheme achieves £7,000 / 200 sign ups in 2022/23	No. Of supporters increased- aim for 200 sign ups this year	Increased events bookings in 2022/23 by 20%	% of Audience “converted” into other opportunity eg attend event, signup for newsletter, repeat visit join digital, donate – recorded in 2022/23 to create baseline for future growth
	Increasing conversion rate for online shop from 4% to 8%	Net profit from Trading Board gifted to the Museum charity increased to £108,000	Growing conversion rate from 26% to 30%	New customers are secured who have not worked with PHM TCS before	Income from one off donors achieves increases by 40% 2022/23	Income generated from donations- inc gift aid - achieves £100,000 in 2022/23	Increased events income – baseline in 2022-3	
	Building net profit back to pre-pandemic levels (see 2019/20 accounts)		Diversifying where enquiries are coming from in 2022/23	Conversion rate from enquiries to contract is recorded (for baseline in 2022/23 and future growth)	Income from high value donors achieves £50,000 in 2022/23	Retention of supporters in 2022/23 monitored (baseline in 2022/23)	Recognition of PHM as leader in ethical events space through press coverage, positive feedback, reviews and other coverage (recorded within Marketing dashboard)	
	Securing and recording income from events (tickets, donations and sales)		Recording no of new customers brought to PHM			Qualitative feedback collected – eg. Quotes, ratings, polls		increased events income – baseline in 2022-3

Note: This Business Plan Aim connects with the museum’s Fundraising Strategy including Trust and Foundation funding, philanthropy and individual giving

Note: This Business Plan Aim aligns with the work of the museum’s Trading Company Board who have oversight of strategic planning, performance management and target setting for PHM’s commercial income and enterprise activity

3. Risk register

Updated February 2022

Description of risk	Risk assessment			Risk mitigation		
	Potential impact (1-5)	Likelihood (1-5)	Overall score	Actions to reduce impact of risk	Responsibility	Dates / Milestones
Organisational						
Covid-19 Ongoing disruption to museum operations in 2021-22 and 2022-23 with reduction in visitors and loss of earned income – including impact of Omicron variant impacting visitor confidence in visiting Manchester city centre and the museum.	4	4	16	<p>Ongoing actions to mitigate impact of Covid-19 include:</p> <ul style="list-style-type: none"> Online and hybrid delivery for audiences (Art Fund Respond and Reimagine project coming to an end – staff currently receiving training on delivering successful hybrid events) Applications for emergency, revenue and unrestricted funding (£6,000 leisure and hospitality Omicron grant secured January 2022) Liaising with key funders and stakeholders (especially GMCA and ACE) (Funding from both ACE and GMCA secured for 22/23) Scenario planning and financial modelling for range of outcomes (22/23 budget involving all members of SLT in forecasting ongoing impact of Covid on finances) Continued close monitoring of income, expenditure and cashflow (with new finance system being selected and introduced in Q4 2021/22) Diversification of income streams through an enterprising approach (Trading Company with responsibility to support Development team with enterprise activity) Business Plan for 2021-22 to prioritise recovery from the pandemic as part of longer term plans to deliver new vision, mission and role for PHM (SLT now working on 2022-23 Business Plan for submission to ACE with continued focus on recovery) 	<p>Board of Trustees</p> <p>SLT</p>	<p>PHM opened to the public from 19 May 2021 (Wed-Sun, 10-4)</p> <p>PHM opening 7 days a week for two weeks in February and three weeks in April to cover GM schools half term and Easter holidays – opportunity to engage audiences and increase secondary spend income</p> <p>Covid-19 impact to be reviewed: Monthly by SLT Quarterly at Board meetings</p>

<p>Covid-19 Risk to staff contracting or passing on covid while working onsite at the museum</p> <p>Risk to museum operations from multiple members of the team isolating due to covid</p> <p>Risk to visitors contracting or passing on covid while visiting the museum</p>	4	3	12	<p>PHM has a covid risk assessment in place which includes risk mitigation for both staff and visitors to the museum. The museum has secured 'good to go' status from Visit England and has put a wide range of covid measures in place for the museum as both a workplace and a public building.</p> <p>With the new Omicron variant and Plan B measures in place during this period, the museum has the following measures in place:</p> <ul style="list-style-type: none"> • All staff wearing face coverings in public spaces and shared office areas • All staff asked to wear face coverings in the museum • The option to register to visit which helps monitor occupancy levels • Hand sanitiser available throughout the building • A supply of lateral flow tests available for staff and a recommendation to use them twice each week • Systems in place for staff who are unwell with symptoms or who test positive on either a lateral flow or PCR test – linked to hybrid working policy and sickness policy • Systems in place for staff to support visitor experience team if required due to covid related staff shortages 	<p>SLT</p> <p>Operations and Visitor Experience Manager</p> <p>All Staff</p>	<p>PHM opened to the public from 19 May 2021 (Wed-Sun, 10-4)</p> <p>Covid-19 impact to be reviewed: Monthly by SLT Quarterly at Board meetings</p>
Knowledge drain from the organisation when staff leave	3	3	9	<p>PHM has a number of procedures in place to mitigate the effect of staff leaving the organisation. These include a general commitment to information sharing in the organisation and a requirement for managers to work a two month notice period, and senior staff to work a three months' notice period so as to create effective knowledge transfer, either to other members of staff or in a document to be created before the end of the contract.</p>	SLT	Ongoing
Difficulties recruiting to key senior management and management roles	3	4	12	<p>Independent review has been commissioned working with consultants (Susan Royce and Dawn Langley) to review the museum's organisational structure, salary</p>	Steering Group (Trustees)	Review to be completed in March 2022.

due to salary levels in comparison with other organisations				<p>levels, payscales and grading, and pensions amongst other areas.</p> <p>The review is underway with a final report with recommendations expected to be delivered by end of March 2022.</p>	Director	
Creating and maintaining an effective and diverse Board of Trustees with the skills and experience to enable PHM to thrive	3	3	9	<p>Board members have maximum terms of office (3 terms of 3 years) which encourages rotation of Trustees with new skills, experiences and backgrounds.</p> <p>Annual skills audits for the Board ensure regular review of the skills and experience needed by PHM and succession planning is in place for when Trustees come to the end of their term.</p> <p>New Chair of Trustees holding 1-2-1 reviews with all Board Members in early 2022 to feed into a skills audit and future board recruitment.</p> <p>PHM to update all EDI data about current Board of Trustees to create benchmark data as part of ACE NPO application and to feed into future board recruitment and succession planning.</p> <p>Open and external recruitment is used to fill positions on the Board, utilising diverse organisations and networks to advertise vacancies – with next recruitment planned for 2022 to follow skills audit and organisational review work (see above).</p>	<p>Chair of Trustees</p> <p>Board of Trustees</p> <p>Executive Support Officer</p>	<p>Annual AGM in November</p> <p>Board reviews in early 2022</p> <p>Trustee recruitment to take place in 2022</p>
Difficulties recruiting staff and volunteers reflective of the diversity of the communities PHM engages with and represents, and with the skills and experience to enable PHM to thrive	3	3	9	<p>PHM created a new Equality, Diversity and Inclusion Action Plan in 2020 and a working group of staff has started to meet to lead and champion this work. This plan includes a section on Organisation and Workforce which includes a commitment from the museum to actively diversify its staff, volunteers and freelancers.</p> <p>In 2021/22 this included a review of all HR policies and procedures, recruitment practices and flexible</p>	<p>SLT – Head of Collections and Engagement</p> <p>Executive Support Officer</p>	Ongoing

				<p>working. PHM also committed to actively increasing the diversity of the team with new opportunities, advertising through diverse networks and partnerships, exploring apprenticeship options and thinking creatively about recruitment away from the usual routes into the museum sector. This has been successfully in 2021 with the appointment of two Collections Assistants, 4 NAUWU Community Curators, an Engagement Assistant and 3 Visitor Experience Assistants – with lessons learnt to be applied to future recruitment.</p> <p>In 2022 the museum is taking part in a Museum Development Equity in Museums programme which is supporting this area of work – led by the Head of Collections and Engagement</p>		
Reputational damage to PHM as a result of negative press coverage, social media posts or complaints from a member of the public	3	3	9	<p>As an activist museum involved in current issues, events and campaigns, there is an increasing likelihood of receiving alternative and negative responses to content and messages shared / communicated by PHM.</p> <p>PHM is prepared for this and protects its reputation through a series of measures:</p> <ul style="list-style-type: none"> • Having a crisis communications plan in place which outlines process and responsibilities in the event of negative coverage • Training and support for relevant PHM staff in dealing with a communications crisis • Discussion with the Chair and Trustees about any perceived risk to reputation • Notification of the Chair of Trustees in the event of a communications crisis • Complaints policy in place for processing any complaints professionally and responsibly 	<p>SLT</p> <p>Communications Manager</p> <p>Fido PR</p>	Ongoing in response to issues
Technical / Operational						
A natural or other disaster affects the museum's building or collections, including flood and fire	5	2	10	PHM has a Disaster Plan in place outlining all the actions to be undertaken in case of an emergency which would affect the building or collection. Copies of this are held by all named people in the plan with shared responsibility for taking action.	Head of Finance & Operations / Head of Collections & Engagement	Ongoing and in response to specific issues and events (eg. Flooding alerts, building damage or leaks)

				<p>PHM has a contract in place for security support and surveillance with Spinningfields security which includes regular patrols around the building (including flood watch) and building alarm support.</p> <p>The museum has regular fire safety checks and provides training for staff on emergency evacuation and fire response.</p> <p>PHM has seen very high river levels on the Irwell in recent years and needs to fully understand the risk to PHM. Information has been obtained from the Environment Agency and the museum plans to commission someone to model the risk from flooding to the archive in particular (funding permitting).</p>	Operations and Visitor Experience Manager	
<p>Terrorism</p> <p>Impact of Terror-related activities;</p> <p>Including threats of attacks or actual attacks on the museum</p> <p>including changes in visitor behaviours in Manchester city centre as a result of both perceived terror threats and the impact of actual attacks</p>	4	2	8	<p>Members of PHM's team have attended terrorism awareness training provided by Manchester City Council and the Spinningfields Estate. Further online training has been provided for a wider group of staff, focusing on the Visitor Experience team.</p> <p>PHM continues to engage with partners in the City and in Spinningfields, supporting city-centre strategies to develop a terror resilient offer within the city.</p> <p>With the Migration programme theme and More in Common exhibition (including the display of the Jo Cox memorial wall in 2021) PHM has also received security advice for collections from an Arts Council security adviser and has a number of actions to complete this year on their recommendation.</p>	<p>Head of Finance & Operations</p> <p>Operations and Visitor Experience Manager</p>	Ongoing with regular review of national and local risk levels
Cyber security – including hacking, ransomware, and theft of digital assets and data	4	2	8	<p>The museum's Network Manager has completed cyber-security training and there are plans to roll out relevant training to other staff.</p> <p>PHM's Digital policy includes actions for all staff to ensure they are protecting digital assets, information and data including effective password management,</p>	<p>Head of Development</p> <p>Network Manager</p>	Ongoing

				<p>avoiding clicking through on spam emails and other actions.</p> <p>PHM has carried out an audit of computer equipment across the museum and purchased new laptops (with covid financial support) to improve cyber-security practices.</p> <p>PHM has moved all files to Sharepoint for improved access and to ensure all data and information is securely stored in one place.</p>		
Any of the museum's technical equipment malfunctions or breaks	3	2	6	All the museum's vital equipment is either subject to warranties or a maintenance contract is in place. Smaller items not covered by the above can be replaced as required.	All staff	Ongoing
The museum's modes of communication (web/social media/print/telephones) are disabled in some way	3	1	3	<p>Were the museum's website to go off-line for any amount of time, then a back-up plan is in place with the company that has designed the website.</p> <p>All museum print is outsourced on an as-needed basis. The museum's telephone system has a maintenance contract in place.</p>	<p>Head of Development</p> <p>Business Development team</p> <p>Executive Support Officer</p>	Ongoing
Financial						
Failure to receive funds from major funder	5	3	15	<p>The museum Trustees and senior staff prioritise the seeking and retaining of funds from all sources so that the work of the museum can continue. The museum has a track record of over 30 years of managing the finances of the organisation.</p> <p>In response to the current overall funding climate the museum has plans in place to strengthen its fundraising and income generation activities as outlined in the Fundraising Strategy.</p> <p>PHM has worked with external consultants over the past year on a new approach to Enterprise activity and diversification of income. PHM has also worked with a freelance fundraiser in 2021 to provide</p>	<p>Director</p> <p>Head of Finance & Operations</p> <p>Head of Development</p>	Ongoing with annual income and fundraising targets set within the Business Plan

				<p>additional skills and capacity while recruiting senior leadership posts.</p> <p>PHM's Head of Development has developed an active pipeline for funding with applications submitted, applications underway and an analysis of future funding opportunities – shared with SLT and engaging the wider team in fundraising where appropriate.</p>		
Failure to receive funds from GMCA which provides the highest proportion of the museum's revenue funding (30% of total income)	5	3	15	<p>PHM has received funds from AGMA / GMCA since 1988, successfully delivering against funding priorities each year with delivery across Greater Manchester districts and maximising its GVA and economic impact for the region.</p> <p>The museum has a GMCA representative on the Board of Trustees (currently a Salford Councillor) which helps to maintain good relationships – as well as having good relationships with senior GMCA officers responsible for the Culture Fund.</p> <p>PHM has good political support from the GM Mayor which Trustees and Executive staff need to maintain and develop.</p> <p>PHM has been informed that the museum will receive a standstill grant for 2022/23 without needing to apply for an extension which provides some security for this financial year and next. PHM is currently working with GMCA staff to agree funding contract and monitoring targets for 2022/23.</p>	<p>Board of Trustees</p> <p>Director</p> <p>Head of Development</p>	Ongoing
Failure to secure support from the Arts Council as an NPO for the next round of funding from 2023 onwards (20% of total income)	5	3	15	<p>PHM has been a NPO since 2018 and funding has recently been extended until 2023 due to the pandemic. The museum will be reapplying for its NPO status and funding in early 2022 and the removal of NPO funding would have an immediate effect, requiring a significant review of costs for staff, buildings and service provision, and reduction in delivery of the museum's ambitious aims and objectives for the 2020-2030 period.</p>	<p>Board of Trustees</p> <p>Director</p> <p>SLT</p>	<p>Ongoing</p> <p>Reapplication for NPO funding in early 2022 (deadline 26 April 2022)</p>

				<p>PHM has a good working relationship with ACE relationship managers and has been visited several times by senior members of the ACE team. PHM Trustees and the Executive need to continue to maintain and develop these relationships to raise the national profile of the museum.</p> <p>PHM has delivered against all previous and existing Arts Council priorities (including a 'strong' rating for the Creative Case for Diversity) and has been involved in the consultation and development of the new strategy – 'Let's Create'.</p> <p>PHM's work aligns well with Arts Council Let's Create outcomes and investment principles and the museum has developed its investment principles plan for 2022/23 and will be building on this work for its NPO application due late April 2022.</p>		
Museum is unable to achieve and maintain the appropriate level of reserves needed for the organisation	4	3	12	<p>Reserves Policy statement: The build-up of large reserves is not a priority for the museum as available money is used to achieve the Charity's aims. The Charity's main funders will provide at least 3 months' notice with equivalent grant monies should they intend to withdraw funds. The Trustees have agreed that this together with a general reserve of at least £350,000 to be made up of all unrestricted current assets will enable the museum to run whilst alternative funding is sought.</p> <p>PHM has been able to replenish reserves with support from CRF2 funding (provided as part of Covid support for the sector in 2020-22) and has a healthy reserves position at the start of 2022.</p>	Head of Finance & Operations	Reviewed annually at AGM as part of annual audited accounts (November)
PHM's high pension contributions (currently around 25% employer contributions) becomes unsustainable as oncosts add 35% onto	4	3	12	PHM is part of the Greater Manchester Pension Scheme (underwritten by Manchester City Council) and as a small employer, the current contributions of 25% are very generous and very costly to the organisation.	<p>Chair & Board of Trustees</p> <p>Director</p>	Review to be completed in 2022.

staffing costs which is disproportionate for the size and scale of organisation				A review of the pension scheme and levels of employer support would be helpful in considering options for the future in a professional and appropriate way which continues to provide staff benefit while also considering the financial resilience of the organisation. This has been built into the consultancy piece of work described above to be completed in early 2022. The consultants working on this project have benchmarked PHM against other organisations in relation to pension schemes and will include this information alongside recommendations in their final report for Trustees to review and consider for future action.		
Un-foreseen problems occur which require financial input, especially in relation to the building	3	5	15	<p>All museum buildings and equipment are properly inspected and maintained to avoid early damage and forced replacement. There is a regular condition assessment completed and PHM has a contract in place with an external building management company who works alongside the Operations Manager.</p> <p>An allowance is made for the planned replacement of perishable items such as light bulbs and IT equipment.</p> <p>Projects are not undertaken unless a high proportion of the finances needed, particularly staffing, to cover the project are in place.</p> <p>PHM has applied for Arts Council Capital Investment to improve physical access to the museum building as part of the Nothing About Us Without Us programme (funding decision due April 2022 and work due to take place at the end of 2022).</p>	<p>Director</p> <p>Head of Finance & Operations</p> <p>Operations and Visitor Experience Manager</p>	Ongoing
Debtors to the museum fold and moneys owed to the museum are not received	3	1	3	The museum has a wide range of businesses it deals with and as a result the risk of any business defaulting on payment is spread and the size of the moneys potentially lost to the museum is modest.	<p>Head of Finance & Operations</p> <p>Finance Officer (retiring in March 2022) / Finance</p>	Ongoing

				<p>Where the museum is owed larger amounts of money (e.g. for external contracts for conservation or for its catering concession), the museum always require either staged payments or regular part payments.</p> <p>PHM will also be sourcing and introducing a new finance system in Q4 2021/22 in time for the new financial year which will have better digital functionality and integration with other PHM services and systems – enabling effective control of debtors and creditors.</p>	Apprentice (to be recruited in early 2022)	
Museum fails to secure unrestricted income from individual giving and trading income against targets set for this Business Plan (adjusted in 2021/22 to allow for Covid-19 recovery)	5	3	15	<p>The museum's individual giving income is made up of donations on-site, on-line donations and income from the Join the Radicals campaign. Targets are reviewed annually to ensure the right balance between being ambitious and realistic. Recent success with a crowdfunding campaign has demonstrated huge support for the museum. Better use of the CRM will also improve and automate donor communications to retain and build the donor base.</p> <p>Targets for Trading income are set by the Trading Company Board and this year reflect the uncertainty associated with events recovery and visitors returning to the museum following the pandemic. New income streams are being explored as part of a roll out of enterprising culture and activity across the museum.</p>	Head of Development	<p>Ongoing</p> <p>Quarterly financial updates on income for Audit and Risk, Trading Company Board and Board of Trustees</p>
Legal						
PHM leases or contracts challenged	3	1	3	All major leases and contracts are drawn up and checked by our solicitors Pannone. PHM also has pro bono legal support from Thompsons Solicitors via representation on the Board of Trustees.	<p>Director</p> <p>Head of Finance & Operations</p>	Ongoing
Accident or injury to any visitor or employee at the museum	4	2	8	<p>PHM ensures that all statutory Health & Safety legislation is followed, with training in First Aid and Fire Marshall Evacuation for appropriate staff.</p> <p>A range of workplace risk assessments are completed and reviewed by relevant managers. All</p>	<p>Head of Finance & Operations</p> <p>Operations and Visitor</p>	Ongoing

				<p>areas of the museum's building (including the stores at 103 Princess Street) and all equipment are regularly inspected and maintained.</p> <p>PHM has comprehensive Building, Contents, Public Liability, and Employee Insurance in place.</p>	Experience Manager	
Grievance or Unfair Dismissal Claims from staff	3	1	3	<p>When required PHM seeks advice from Manchester City Council HR department or an alternative HR adviser on areas including strategic changes to HR legislation and HR policies and procedures.</p> <p>PHM also has pro bono legal / HR support from Thompsons Solicitors via representation on the Board of Trustees.</p> <p>PHM has a performance management system in place with annual staff performance reviews to set clear and measurable objectives. This will be reviewed and updated in 2022 as part of the roll out of recommendations and changes from the organisational review project.</p> <p>PHM will also introduce a culture of regular feedback between managers and teams and across peers, to support development and performance and ensure that any problem areas are dealt with promptly and professionally.</p>	<p>Director</p> <p>SLT</p> <p>Executive Support Officer</p>	Ongoing with annual performance review
Company/ Charity Law violation	4	1	4	<p>PHM has a track record of compliance with Company Law and Charity Legislation and ensures that statutory returns are made each year. PHM's appointed auditors (Beever and Struthers) carry out the annual external audit and advise the Board of Trustees of any concerns.</p>	<p>Head of Finance & Operations</p> <p>Executive Support Officer</p>	Annual calendar of dates for statutory returns

Evaluating Risk

This risk assessment is based on the 5 Steps to Risk Assessment model and uses numerical values to calculate the levels of risk. In practice this means we simply assign a value of 1-5 for the likelihood of the hazard causing harm and a value of 1-5 for the potential impact of the harm should it occur (1 being the lowest value, 5 being the highest). The two figures are then multiplied to achieve a risk rating score: $L \times S = R$.

Likelihood (L)		Impact(I)	
Rating	Guide words	Rating	Guide words
1	Extremely unlikely Probably never happen, control measures in place to prevent occurrence	1	No/Minor harm
2	Unlikely Not expected, but may have occurred once or twice in history	2	Moderate harm
3	Likely Could occur at any time, occurrence in other churches. More control measures required	3	Serious harm
4	Extremely likely A history of frequent occurrences in other churches. Those with knowledge of the issues new this would happen at some point	4	Major harm
5	Almost certain A history of regular occurrence in other churches. Regarded as almost inevitable	5	Catastrophic

Risk rating key:

Score	Risk Level	Description
1-4	Very Low	These risks are considered acceptable. No further action is necessary other than to ensure that the controls are maintained.
5-10	Low	No additional controls are required unless they can be implemented at very low cost (in terms of time, money, and effort). Actions to further reduce these risks are assigned low priority. Arrangements should be made to ensure that the controls are maintained.
11-15	Medium	Consideration should be given as to whether the risks can be lowered, but the costs of additional risk reduction measures should be considered. The risk reduction measures should be implemented within a defined time period. Arrangements should be made to ensure that the controls are maintained, particularly if the risk levels are associated with harmful consequences.
15-20	High	Substantial efforts should be made to reduce the risk. Risk reduction measures should be implemented urgently within a defined time period and it might be necessary to consider suspending or restricting the activity, or to apply interim risk controls, until this has been completed. Considerable resources might have to be allocated to additional controls. Arrangements should be made to ensure that the controls are maintained, particularly if the risk levels are associated with extremely harmful consequences and very harmful consequences.
20+	Very High	These risks are unacceptable. Substantial improvements in risk controls are necessary, so that the risk is reduced to an acceptable level. The work activity should be halted until risk controls are implemented that reduce the risk so that it is no longer very high. If it is not possible to reduce risk the work should remain prohibited.

4. Strategic fit

The museum connects closely with the aims and priorities of its main funders and supporters including:

Greater Manchester Combined Authority (GMCA)

As one of the 35 organisations in the GM Culture Portfolio, PHM is committed to supporting GMCA with delivery against the Cultural Recovery Plan and the Cultural Strategy. Working with residents and communities across the combined authority has been a key part of the museum's work for many years and continues to be fundamental to the aims and priorities outlined in this Business Plan.

Cultural Recovery Plan

"The cultural and creative sector has a huge role to play in the recovery our economy, high streets and town centres, consumer confidence and national and international reputation and, equally importantly, in Greater Manchester's collective healing; from commemorating, marking and trying to make sense of the events of the past year, to supporting our residents' physical and mental health, providing educational opportunities for our young people and bringing people together, as a community again."

GM has asked organisations to focus delivery in the following areas in response to the Covid-19 pandemic:

- providing paid employment for artists and freelancers
- providing activity for GM residents, especially in relation to mental health, education, physical health and reducing inequality
- working with and in our high streets, towns, and city centres
-

The GM Culture Portfolio will continue to deliver the following themes, helping local places and residents to heal; marking and making sense of the events of the pandemic:

- Digital connections
- Coming together
- Healing
- Planning for the future

	PHM Aims and Priorities	Evidence and Impact
Delivery areas		
Paid employment for artists and freelancers	<ul style="list-style-type: none"> • Impact-led engagement 	<ul style="list-style-type: none"> • No of freelancers employed • GM freelancers employed • Diversity of freelance team
Activity for GM residents	<ul style="list-style-type: none"> • Impact-led engagement • Celebrating our stories 	<ul style="list-style-type: none"> • Number of people from GM engaging with PHM services • GM communities represented in PHM exhibitions and programmes • GM schools engaging with PHM
Working in our high streets, towns, and city centres	<ul style="list-style-type: none"> • Activist profile and branding • Building financial sustainability 	<ul style="list-style-type: none"> • Press coverage in GM / featuring GM • Café, retail and commercial services operating at PHM (income and value added)
Themes		
Digital connections	<ul style="list-style-type: none"> • Digital transformation 	<ul style="list-style-type: none"> • Delivery of PHM programmes online and hybrid • Analysis of PHM online audiences (including GM audiences) • Freelance employment to deliver online activities
Coming together	<ul style="list-style-type: none"> • Impact-led engagement • Access and inclusion 	<ul style="list-style-type: none"> • Museum reopening to the public from May 2021 (visitor numbers and profile)

		<ul style="list-style-type: none"> • Evaluation of impact of PHM programme on participants (using impact and insight toolkit) • Covid-secure events delivered at PHM
Healing	<ul style="list-style-type: none"> • Celebrating our stories • Access and inclusion 	<ul style="list-style-type: none"> • Contemporary collecting around Covid-19 and the events of 2020 • Participation in GM Ageing Hub • Migration programme theme in 2021 • Disability rights programme theme in 2022
Planning for the future	<ul style="list-style-type: none"> • Investing in the future • Environmental impact 	<ul style="list-style-type: none"> • Collaborative marketing campaigns for culture • Partnerships with other GM organisations

Cultural Strategy (2019-2024)

“BY 2024, GREATER MANCHESTER’S CULTURAL OFFER WILL REFLECT THE DIVERSITY OF OUR PEOPLE, WHO FEEL EMPOWERED TO SHARE THEIR STORIES WITH THE WORLD, IMPROVING THEIR WELLBEING AND INCREASING THE PROSPERITY OF OUR BUSINESSES AND THE ATTRACTIVENESS OF OUR PLACES.”

The museum is already working to deliver against the GMCA Culture Strategy which was launched in 2019 – Grown in Greater Manchester. Known Around The World (2019-2024). PHM was involved in the consultation around the strategy and is very much committed as part of the Culture Portfolio to delivering against its aims and objectives.

The museum continues to be in a strong position to support and deliver against all of the priorities of the GMCA Culture Fund and has received a standstill grant for 2020-22 in recognition of its successful delivery in previous years:

1. Contribute to the recognition of Greater Manchester locally, nationally and internationally to attract new investment, new visitors and new talent to Greater Manchester
 - Makes a contribution of over £10 million to the Greater Manchester economy through all of its activities each year (as measured by the AGMA grants team)
 - Attracts a significant number of visitors into the region from other parts of the UK and from overseas who then spend money while visiting Greater Manchester
 - Is a national museum in Manchester and attracts significant amounts of national press coverage; raising the profile of Greater Manchester through the museum’s work
2. Make a positive contribution to improving skills and employability of residents in Greater Manchester, including support for the creative education, expression and ambition of young people across Greater Manchester
 - Provides a learning and engagement programme that supports the creative learning and development of children and young people from under 5s through to university students
 - Provides skills, training and employment opportunities for Greater Manchester residents and provides a volunteering, placement and intern programme
3. Play a strong role in developing strong and inclusive communities and an improved quality of life for residents, particularly those residents at risk of disengagement or social isolation
 - Delivers a programme of exhibitions and events in partnership with other organisations and communities focused on the ‘ideas worth fighting for’ at the heart of our society and democracy; giving people a space where their voices can be heard and where they can help shape future provision

- Co-curates a programme of exhibitions and events with communities, organisations, schools and others from across Greater Manchester, with a focus on groups with protected characteristics and those least engaged with museums, art and culture
4. Be able to evidence how the project will make a positive contribution to improving residents' health and wellbeing
- Is actively involved in city region priorities including Age-friendly, health and wellbeing, and safe and strong communities with a programme of events and activities delivered both within the museum and out in local communities
 - Provides a cultural resource for the people of Greater Manchester to visit for enjoyment, entertainment, learning, community events and for business

Manchester City Council

Based in the city centre, the museum works closely with Manchester City Council (MCC) and receives support with rent and rates costs for both the main museum building and its storage site on Princess Street in Manchester.

The Museum pays for MCC administration of its monthly payroll system and the Council is the guarantor which allows Museum staff membership of the GM Pension Fund. The museum also receives advice as required from the HR and legal teams at the City Council. MCC is represented on the PHM Board with a designated Trustee position occupied by a City Councillor.

The museum's Director is a member of the Manchester Cultural Leaders Group, playing an active role in the group that takes responsibility for ensuring that the city's cultural organisations are able to deliver against city priorities. Working collaboratively on strategy, advocacy and programming brings additional strength and impact to the cultural offer of the city for local residents as well as for its national and international reach.

National Lottery Heritage Fund

Having received capital funding of over £7 million from the NLHF towards the museum's redevelopment (completed in 2010), the museum has an excellent ongoing relationship with NLHF and continues to successfully apply for project funding to deliver a range of programmes and services.

The museum is a champion of the NLHF's outcomes for heritage, people and communities through all of its work and has been very pleased to have received NLHF funding for:

- Project funding for the Nothing About Us Without Us programme on disabled people's activism launching in 2022 (grant of £130K)
- The museum's exhibitions programme (*A Land Fit For Heroes* in 2014, *Never Going Underground* in 2017, *Represent!* in 2018, and *Disrupt? Peterloo and Protest* in 2019)
- The development of online giving for the museum (Catalyst fund)
- A programme of resilience and business planning for the future (Transition Fund)
- A collections acquisitions programme (in partnership with the Working Class Movement Library) (Collecting Cultures)
- As a partner in the Manchester Histories *Peterloo 1819* bicentenary commemoration project

The museum continues to invest in its relationship with the NLHF team in the North and to share its experiences and resources with other applicants to NLHF funding streams including other museums and community groups. The museum has provided space within its community gallery programme for a number of other recipients of NLHF grants and worked in partnership with a range of other organisations on funding bids.

Having recently undergone a strategic review, the NLHF has refocused its name and identity to better connect with how the funding comes directly from National Lottery players and has produced a new Strategic Framework for 2019-2024, with a vision of:

“INSPIRING, LEADING AND RESOURCING THE UK’S HERITAGE TO CREATE POSITIVE AND LASTING CHANGE FOR PEOPLE AND COMMUNITIES, NOW AND IN THE FUTURE”

PHM will continue to consider NLHF funding for appropriate projects and programmes with a focus on the priority area of Community Heritage and thinking carefully about how the museum can help NLHF to:

- continue to bring heritage into better condition
- inspire people to value heritage more
- ensure that heritage is inclusive
- support the organisations we fund to be more robust, enterprising and forward looking
- demonstrate how heritage helps people and places to thrive
- grow the contribution that heritage makes to the UK economy

Arts Council England

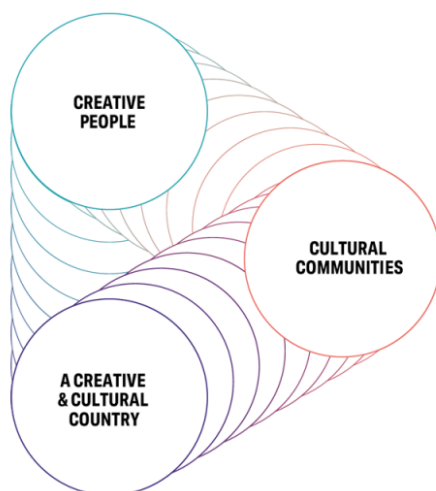
Let’s Create

“BY 2030, WE WANT ENGLAND TO BE A COUNTRY IN WHICH THE CREATIVITY OF EACH OF US IS VALUED AND GIVEN THE CHANCE TO FLOURISH, AND WHERE EVERY ONE OF US HAS ACCESS TO A REMARKABLE RANGE OF HIGH-QUALITY CULTURAL EXPERIENCES”

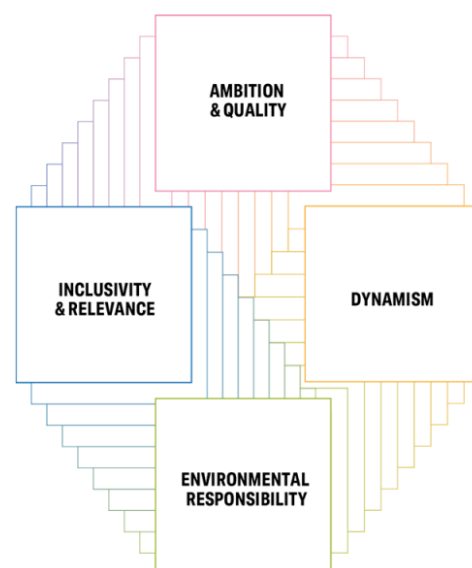
PHM has been actively working on its contribution to the delivery of the aims and investment principles within Arts Council’s Strategy. There is a lot of synergy between Let’s Create and the museum’s existing work to collaborate and co-create with communities in order for them to share their histories and stories and express their own culture and creativity within the museum’s programme.

PHM is committed to continuing to build upon its successes and its experience and to be a space for people’s voices – a place where people come together, play their part and take action to challenge inequality and apathy in order to achieve our vision of a fairer and more cohesive society. This will put PHM in a strong position to help deliver against Arts Council’s outcomes and investment principles as outlined below.

THE OUTCOMES



OUR INVESTMENT PRINCIPLES



Let's Create Outcomes	PHM Aims and Priorities	PHM's areas of work
Creative People	<p>Aim 1: Impact Led Engagement</p> <p>Priority 1: Access and Inclusion</p>	<p>Community collaboration and co-creation embedded across PHM (with track-record of successful models and practice since 2017)</p> <p>Paid opportunities for people with lived experience and community voices to develop, shape and deliver PHM content and programmes (e.g. Nothing About Us Without Us Community Curators)</p> <p>PHM's long-standing community exhibition programme, sharing unheard and hidden stories, community experiences and creative work from local individuals and groups</p> <p>PHM's creative programme and resources for people to create and make their own work connected to the museum's collections, stories and ideas (e.g. Fabric of Protest collective, Banner making workshops and more)</p> <p>PHM reviewing its Learning Programme to improve the impact of activities by, with and for children and young people – for families and schools and with a focus on access and inclusion</p>
Cultural Communities	<p>Aim 1: Impact Led Engagement</p> <p>Aim 2: Celebrating our Stories</p> <p>Aim 3: Bold Profile and Brand</p>	<p>PHM playing an active and collaborative role in Greater Manchester's creative and cultural sector</p> <p>PHM working in partnership to develop and deliver its programme with a focus on organisations who can connect with communities, add expertise and skills, and complement the museum's own strengths and USP</p> <p>PHM's role as an activist museum, giving agency and voice to individuals and communities who are unheard and marginalised – working with communities and partners to inspire change and positive action (e.g. Positive campaigning around current issues affecting disabled people and their lives and rights)</p> <p>A commitment to audience development at PHM (recognising impact from Covid-19) focussed on visitor confidence and expectations – building on the museum's plans to engage more people, different people and at deeper levels</p> <p>PHM's blended approach to impact-led engagement (making effective and thoughtful use of technology for online activity alongside activity in the building and through outreach in communities)</p>
A Creative & Cultural Country	<p>Priority 1 Access and Inclusion</p> <p>Priority 4: Investing in the Future</p>	<p>PHM's recent and current work on diversifying the museum's workforce through different recruitment practice, community based advertising, apprenticeships and more</p> <p>PHM's commitment to recruiting and employing people with lived experience of a programme theme in paid roles as Community Curators / Community Programme Team members</p> <p>PHM's ongoing employment of freelancers and artists to develop content, design exhibitions, work with audiences (including children and young people) and a commitment to provide opportunities for disabled artists and designers as part of Nothing About Us Without Us</p> <p>PHM's active involvement in networks and partnerships in the cultural sector as well as with community partners, campaigning partners and others</p>

5. Investment Principles Plan

INCLUSIVITY & RELEVANCE						
PHM WORKING GROUP: Priority 1: Access and Inclusion						
Element	Current Strengths	Development areas	Actions	Timeline	Evidence and data	PHM Business Plan Aims and Priorities
Communities <i>We are actively listening to, and taking account of, the views of the local community, children and young people, artists, practitioners, and stakeholders we work with.</i> <i>We actively form relationships with underserved communities. As a result we matter more to more people.</i>	<p>Strong partnerships across PHM programmes – working with partners, individuals and groups with lived experience of the stories we want to share</p> <p>Migration programme led by Community Curators (individuals with lived experience of migration)</p> <p>Nothing About Us Without Us (NAUWU) Steering Group– a group of disabled people and activists – and a team of 4 paid Community Curators</p> <p>NAUWU – external access audit completed with key recommendations to improve physical and sensory access</p>	<p>Audience demographics to reflect community engagement at a programme level – defining who PHM's 'communities' are on different levels:</p> <ul style="list-style-type: none"> • Local • Regional • National • International <p>Implementation of recommendations and actions from access audit (short / medium / long term priorities) – securing funding for capital works</p> <p>Defining the impact we want to have on communities to be able to monitor and measure positive outcomes of PHM's work</p> <p>Ensuring all community engagement and programming has a clear understanding and focus on intersectionality</p> <p>Legacy and long term impact of short term opportunities for community programmers and curators (often externally funded as part of engagement themes) – on individuals and on PHM, including the opportunity for communities to</p>	<p>Continue to work with partners and co-curators to programme and produce proactively – working with more organisations to increase inclusive practice.</p> <p>Consult visitors and non-visitors to better understand what they want to see at the People's History Museum and by doing so create a dialogue with individuals and groups who may not otherwise use the space or engage with us as a site for sharing their history.</p> <p>Build a way to keep participant voices in the museum after official programme periods have ended through a forum, steering group or other format that</p>	<p>April 22 – March 23 (see NAUWU project plan)</p> <p>Throughout the year linked to programming</p> <p>Migration legacy from July 2022 onwards</p>	<p>Ongoing evaluation of Migration programme theme</p> <p>Consultation documentation for Migration and NAUWU programmes</p> <p>Information on local demographics and diversity data</p> <p>Audience Finder data</p>	<p>Aim 1: Impact-led engagement</p> <p>Aim 2: Celebrating our stories</p> <p>Priority 1: Access and inclusion</p>

		be involved in leadership and governance at PHM (see below)	meets regularly and has set objectives.			
Workforce, Leadership and Governance <i>We have a workforce, leadership and governance which fully reflects and represents the communities we are serving.</i> <i>We have an inclusive organisational culture which values and develops the talent of all the people we work with.</i> <i>We foster a safe workplace where harassment and discrimination is challenged and eliminated.</i>	<p>Strong female leadership team</p> <p>Some diversity on current Board of Trustees (see attached stats)</p> <p>Recent recruitment of entry level positions with a focus on diversity and non-traditional routes into the sector</p> <p>Recent improvements to recruitment to remove barriers for diverse candidates including removal of qualifications and other experience-based criteria, anonymised and blind application assessment</p> <p>Paid community curator posts attached to each engagement theme (4 in 2022 for NAUWU)</p> <p>Previous experience of apprenticeship opportunities at PHM – and being able to retain people in permanent posts</p> <p>PHM as Real Living Wage Employer (including catering contractor / café)</p>	<p>PHM priority protected characteristics agreed as the following (with a strong commitment to intersectionality):</p> <ul style="list-style-type: none"> • Race • Age • Gender • Sexual orientation • Disability • Socio-economic status <p>PHM being able to demonstrate diversity across all areas of the organisation and in different roles – mirroring the strong community engagement work outlined above</p> <p>PHM commitment to sector leadership and advocacy role – sharing experiences and learning of inclusive recruitment and community curator / programme roles</p> <p>PHM to review what leadership means and where it sits in the organisation – with opportunities for staff, volunteers, community collaborators and partners to be engaged and involved in decision making (beyond programming and content)</p> <p>Opportunities for community members involved in programming to have pathways to governance – talent spotting for future Trustees and working closely with partner organisations</p>	<p>Regular updates of EDI monitoring information to ensure data is as detailed and robust as possible – including research into how best to measure socio-economic status</p> <p>Trustee recruitment drive with a focus on diversity and inclusion under these priority areas:</p> <ul style="list-style-type: none"> • Age (younger) • Race • Disability <p>Annual staff survey with a focus on inclusivity and workplace culture</p> <p>Training and development plan for all staff (with mandatory elements) updated yearly with a strong focus on inclusion and diversity</p> <p>Regular review and updates to recruitment processes across</p>	<p>Annual (and when new people join the team)</p> <p>Summer 2022</p> <p>April 2022</p> <p>Annual reviews April 2022</p> <p>Ongoing</p>	<p>Equality and Diversity Monitoring Information – survey completed by staff, volunteers, freelancers and Trustees in July 2021</p> <p>Information from Inclusivity workshop with SLT and Trustees</p>	<p>Priority 1: Access and inclusion</p> <p>Priority 4: Investing in the future</p>

		<p>Continued review and reflection around recruitment practices with a commitment to learning from PHM experiences and building on it for future roles and recruitment – including management and senior management roles</p> <p>Recognition and celebration of diversity of the current team with opportunities for people to share information in a safe space</p> <p>Review of short-medium term opportunities for people to join the PHM team, either as placements, work experience or for apprenticeships</p>	<p>PHM – including flexible means of application (including recording submissions, making application process mobile friendly etc)</p> <p>Hybrid working and meetings to facilitate greater diversity and geographic reach for recruitment of staff and Trustees (investing in tech equipment and training for people facilitating and chairing meetings)</p>	Ongoing		
<p>Creative Case for Diversity</p> <p><i>Our programmes and activities reflect the culture and talent of creative practitioners and cultural workers drawn from all backgrounds.</i></p>	<p>Diverse programme of Community exhibitions, events, learning programmes and interventions which provide opportunities for multiple stories from diverse individuals, groups and artists alongside PHM's displays.</p> <p>Migration programme delivery in 2021/22, including:</p> <ul style="list-style-type: none"> • More in Common: in memory of Jo Cox • #WELCOME? • Migration: A human story <p>Plans for NAUWU delivery in 2022/23 being developed by Engagement Team, Steering Group and Community Curators</p>	<p>Ensuring there is a strong legacy from the Migration programme into 2022 and beyond:</p> <ul style="list-style-type: none"> • Research feeding into PHM's work on decolonising collections and stories • Long term impact of the interventions – • Contemporary collecting on the theme <p>Auditing and understanding the collection we hold and the gaps there are to celebrate our stories and respond to contemporary events and issues – working with collaborators, donors and partners on this area of work</p> <p>Continued work with diverse artists and freelancers to support</p>	<p>NAUWU delivery plans 2022/23 including:</p> <ul style="list-style-type: none"> • Appointment of exhibition designer by Steering Group • Research and development of main NAUWU exhibition for 2022 • Open Call for community exhibitions to illustrate diversity of disability and highlight unheard voices (with an 	April 22 – March 23 (see NAUWU project plan)	<p>Programme and exhibition evaluation reports:</p> <ul style="list-style-type: none"> • Migration evaluation to feedback to JRCT and Art Fund • NAUWU to feedback to NLHF 	<p>Aim 1: Impact-led engagement</p> <p>Aim 2: Celebrating our stories</p> <p>Priority 1: Access and inclusion</p>

	<p>PHM commitment to contemporary collecting with a focus on engagement themes</p> <p>PHM commissioning and contracting of diverse artists, designers and freelancers around each engagement theme</p>	engagement themes, deliver activities and share work and stories	<p>intersectional approach)</p> <p>Be innovative in our use of loans and acquisitions to represent and involve a broader range of voices and experiences through increased call outs and collaboration.</p> <p>Artist collaboration with Jason Wilsher-Mills as part of NAUWU plans – Jason and his Argonauts</p>	<p>Throughout the year linked to programming</p> <p>Summer 2022</p>		
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AMBITION & QUALITY

PHM WORKING GROUP: Priority 4: Investing in the future

Element	Current Strengths	Development areas	Actions	Timeline	Evidence and data	PHM Business Plan Aims and Priorities
<p>Understanding Perceptions</p> <p><i>We develop our creative ambitions and improve the quality of our work by listening to the views of people inside and outside our organisation and immediate circle. We engage with</i></p>	<p>Track record of strong consultation, collaboration and co-curation with communities – including steering groups, community curator roles and other opportunities</p> <p>Providing multiple opportunities for audiences and participants to give feedback</p> <p>Strong partnerships and good relationships with funders and stakeholders who are invested in</p>	<p>Development of a core group of community voices for PHM which isn't tied to a particular engagement theme and has decision making abilities across PHM</p> <p>Continued stakeholder engagement across PHM's work – involving them in strategic planning and investing in partnerships</p> <p>Ensuring that evaluation and monitoring is closely connected to PHM vision, mission and creative ambition – and that multiple voices</p>	<p>Be a space that embeds consultation and evaluation to better understand what is important to visitors and what would motivate visits and improve inclusion.</p> <p>Build a way to keep participant voices in the museum through a forum, steering group or</p>	<p>Throughout the year linked to programming</p> <p>Researching models and developing ideas in 2022/23 for</p>	<p>Community Curator feedback and evaluation</p> <p>Audience Finder feedback</p> <p>Impact and Insight evaluation reports</p> <p>Programme evaluation</p>	<p>Aim 3: Bold profile and branding</p>

<p><i>them about our mission and the quality of our creative and cultural programmes.</i></p>	<p>the delivery of the museum's work and engagement themes</p> <p>Accredited museum with Designated collection</p> <p>Existing use of tools to measure quality of PHM's work through Impact and Insight toolkit and Audience Finder surveys</p>	<p>are involved in evaluation and reviews</p> <p>Trustees engagement with the quality of PHM's work as an audience attending events and exhibitions to provide their feedback and as reviewers of evaluation material and reports at quarterly Board Meetings</p>	<p>other format that meets regularly and has set objectives.</p> <p>Ongoing Impact and Insight evaluation engaging with community and peer voices to evaluate work</p> <p>Develop a new Stakeholder Engagement Plan mapped against 22/23 Business Plan</p>	<p>implementation from 2023 onwards</p> <p>Throughout the year (at least 4 evaluations)</p> <p>April 2022</p>		
<p>Progression</p> <p><i>Our plans for our creative and cultural work clearly contribute to our aims and ambitions.</i></p> <p><i>We are committed to professional development and work with appropriate creatives and partners to refine and improve our creative and cultural practice.</i></p>	<p>Impact-led engagement placed at the heart of PHM Business Plan and closely aligned with vision, mission and role</p> <p>Strong partnerships across PHM programmes and engagement themes – working with partners, individuals and groups</p> <p>Freelance artists and specialists employed across the museum's engagement work</p> <p>Paid Community Curator roles for each Engagement Theme bring lived experience and a breadth of skills</p>	<p>Continuing to embed the vision and mission across all engagement work and programme themes</p> <p>Invest in PHM's training plan at organisation and individual level – including volunteers, freelancers and community curators to provide universal professional development opportunities</p> <p>Use networks to access training and development opportunities from the wider arts sector (locally and nationally)</p> <p>Commit to sharing PHM's knowledge, skills and expertise in community collaboration and inspiring action through the arts – playing a leadership and advocacy role in the sector</p>	<p>Workshops and meetings to discuss the roll out of the vision and mission through all departments and teams</p> <p>Annual staff survey to include freelancers</p> <p>Annual training and development plan to include volunteers, freelancers and community curators</p> <p>Attendance at sector conferences, writing blog posts and sharing learning on social platforms</p>	<p>Quarterly throughout the year</p> <p>April 2022</p> <p>Annual and linked to performance reviews</p> <p>Ongoing</p>	<p>Peer reviews as part of Impact and Insight evaluation reports</p> <p>Feedback from freelancers and community curators as part of our professional support</p>	<p>Aim 1: Impact-led engagement</p> <p>Priority 4: Investing in the future</p>

Measuring Performance <i>We establish appropriate bespoke indicators to help us measure and express what good looks like for us, demonstrate our ambition, identify scope for improvement, and track progress. We use these indicators to shape our work and future plans.</i>	<p>Quarterly reports for Board Meetings with qualitative overview and performance data</p> <p>Engagement outcomes defined at start of programmes / projects to shape all evaluation</p> <p>Business Plan includes Action Plan with details for delivery across departments and teams</p> <p>Departmental Strategies in place with aims, objectives</p>	<p>Continued review and improvement of reporting for Board of Trustees</p> <p>Defining the impact we want to achieve through our vision and mission to be able to monitor and measure positive outcomes of PHM's work</p> <p>Develop a more rigorous approach to setting SMART targets across the museum's work</p> <p>Cascade aims, objectives, indicators and targets from the Business Plan to the Action Plan to departments, teams and individuals</p>	<p>Annual governance review as part of AGM</p> <p>Development of SLT dashboard for monitoring performance live throughout the year</p> <p>Reviews for all staff annually and bi-annually to set clear objectives with measurable targets and performance indicators</p>	<p>Q3 22/23</p> <p>April 2022</p> <p>April (annual) and October (bi-annual check-in)</p>	<p>Audience Finder data</p> <p>Impact and Insight evaluation reports</p> <p>Programme evaluation</p>	<p>Aim 1: Impact-led engagement</p> <p>Priority 4: Investing in the future</p>
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DYNAMISM						
PHM WORKING GROUP: Priority 3: Digital Transformation (with cross over to AIM 4: Building financial sustainability and enterprise)						
Element	Current Strengths	Development areas	Actions	Timeline	Evidence and data	PHM Business Plan Aims and Priorities
Mission and Business Model <i>We ensure that our creative and cultural mission – and the business model that supports it – can adapt to</i>	<p>Strong vision, mission and role (developed in 2010 as part of PHM's 10th Birthday) with a focus on relevance, impact and action</p> <p>Vision, mission and role places inclusivity and relevance at the heart of PHM with strong community engagement in place.</p> <p>Clear risk register included within Business Plan and reviewed</p>	<p>Development of clearer internal dashboards to measure and monitor performance across PHM by both SLT and Trustees. Using data to drive our activity and understand where to focus and where to experiment</p> <p>Regular feedback from community collaborators (steering groups, community curators and partners) built into evaluation processes to</p>	<p>Create a new dashboard for SLT and Trustees which will collect and collate data for agile decision making</p> <p>Regular meeting structure for SLT and Trustees to focus on strategic</p>	<p>Quarterly throughout the year</p> <p>March 2022</p>	<p>Board minutes</p> <p>Audit and Risk Committee minutes</p> <p>Trading Company Board minutes</p> <p>Final report from consultants on</p>	<p>Aim 4: Building financial sustainability and enterprise</p> <p>Priority 4: Investing in the future</p>

<p><i>the changing environment around us and the needs of the communities we serve.</i></p> <p><i>We demonstrate this by regularly examining how we operate and developing an understanding of the value we create for our customers and our community, seeking out practical ways to improve and develop.</i></p>	<p>quarterly by Audit and Risk Committee</p> <p>Active Trading Company Board overseeing and driving commercial income and new Head of Development (appointed 2021)</p> <p>Strong financial track record and new Head of Finance (appointed 2021) updating financial processes and procedures in 2021</p> <p>PHM commissioning a consultant to carry out an organisational review with SLT and Trustees in late 2021 which will support delivery of the museum's new vision and mission</p> <p>Strong visitor confidence and retention – strong audience engagement evidenced through visitor numbers, trip advisor reviews, social media engagement growth, e-news and blog engagement</p> <p>Income opportunities – retail, venue hire, café, events</p>	<p>feed into PHM's strategic plans and future work</p> <p>Implementing recommendations from the organisational review in 2021</p> <p>Ensuring Trustees have opportunities to engage with and discuss the context in which PHM is operating as part of quarterly Board Meetings</p> <p>Proactive marketing of our commercial offer. Pulling on social impact as way to develop income streams – donations, regular giving, venue hire</p> <p>Exploit opportunities to upsell through audience journeys</p> <p>Developing new income streams – events, walking tours, retail products, experiences especially</p> <p>Explore opportunity for social investment to inject investment into commercial activity</p> <p>Develop campaigning voice of PHM to support growth and profile – pull in strength of collection and archive to add our own slant</p>	<p>priorities and drive change</p> <p>Action Plan to be created using recommendations from organisational review (led by Director)</p> <p>Think about invited guests and external content which could be included within Board Meeting structures</p> <p>Business plan for commercial income streams, developed to attract social investment</p>	<p>Weekly / Monthly / Quarterly</p> <p>Throughout the year – see Board Meeting dates</p> <p>April 2022</p>	<p>organisational review TBC</p>	
<p>People and Skills</p> <p><i>We invest in robust, committed governance and skilled, ethical and resilient leadership from</i></p>	<p>External management review commissioned in 2021/22 – working with consultant as part of PHM Priority 4</p> <p>Annual reviews for staff - setting performance objectives mapped against the Business Plan</p> <p>Active involvement in sector networks (local and national)</p>	<p>Delivering recommendations from management review with priority actions in 22/23</p> <p>PHM to review what leadership means and where it sits in the organisation – with opportunities for staff, volunteers, community collaborators and partners to be engaged and involved in decision</p>	<p>Reviews for all staff annually and bi-annually to set clear objectives, agree training plans and discuss wellbeing</p> <p>Annual staff survey</p>	<p>April (annual) and October (bi-annual check-in)</p> <p>April 2022</p>	<p>External review findings</p> <p>Benchmarking information</p> <p>Individual annual performance reviews</p>	<p>Priority 4: Investing in the future</p>

<p><i>our senior team. We recognise leaders come in many forms and back those who inspire positive change. We support the development and wellbeing of all our workforce, including freelancers, so they can deliver our mission effectively.</i></p>	<p>Committed, experienced and skilled Board of Trustees (with new Chair appointed in November 2021)</p> <p>Committed, experienced and skilled staff team willing to develop and drive change, as evidenced by our campaigning work.</p> <p>Flexible and remote working approach accelerated due to the pandemic and many staff wanting to retain a hybrid approach for the future</p> <p>Strong partnership working and value this brings. Good relationships with partners and suppliers and with press contacts</p>	<p>making (beyond programming and content)</p> <p>Developing entrepreneurial skillset of teams – especially spotting opportunities to drive additional income and generate new customers</p> <p>Entrepreneurial mindset and collaborative culture</p> <p>Stronger internal communications to encourage cross team collaboration and shared outcomes</p> <p>Working with cultural partners in the city region to champion the sector and innovate in shared offer</p>	<p>Annual training and development plan for all staff (with mandatory elements)</p> <p>Hybrid working and meetings continue (investing in tech equipment and training for people facilitating and chairing meetings)</p> <p>Regular internal comms structure established – briefings, emails and team meetings</p>	<p>Annual and linked to performance reviews</p> <p>Ongoing</p>		
<p>Using Tech and Data</p> <p><i>We are committed to using data and appropriate technology to move our business forward. We prioritise developing digital skills and literacy across our business and our decision making is informed by</i></p>	<p>Successful hybrid and online delivery of engagement activities in 2020 and 2021. Training for team in setting up hybrid events and designing events.</p> <p>Technology set up to enable remote working due to the pandemic in place with platforms, systems and equipment in place for working from home and attending meetings, running events etc</p> <p>Development of digital data collection and analysis over recent years with greater understanding and appreciation of digital data across the team</p>	<p>Embedding digital skills within PHM training plan and keeping skills and understanding up to date</p> <p>Utilise technology to smarten up processes e.g. CRM can automate and integrate to create less manual work</p> <p>Continued investment in equipment and facilities to enable remote and agile working and to facilitate online and hybrid meetings and events (internal and public)</p> <p>Prioritising data and information led decisions and supporting all staff to understand the data they need to collect and analyse to develop future work.</p>	<p>Create a new dashboard for SLT and Trustees which will collect and collate data for agile decision making</p> <p>Hybrid working and meetings continue (investing in tech equipment and training for people facilitating and chairing meetings)</p> <p>Digital transformation group action plan</p>	<p>April 2022</p> <p>Ongoing</p> <p>6 week meeting cycle throughout the year</p>	<p>Leading the Sector experiment and learning from 2020/21</p> <p>Data and analytics from social media, website, online engagement and visitor bookings</p>	<p>Priority 3: Digital transformation</p>

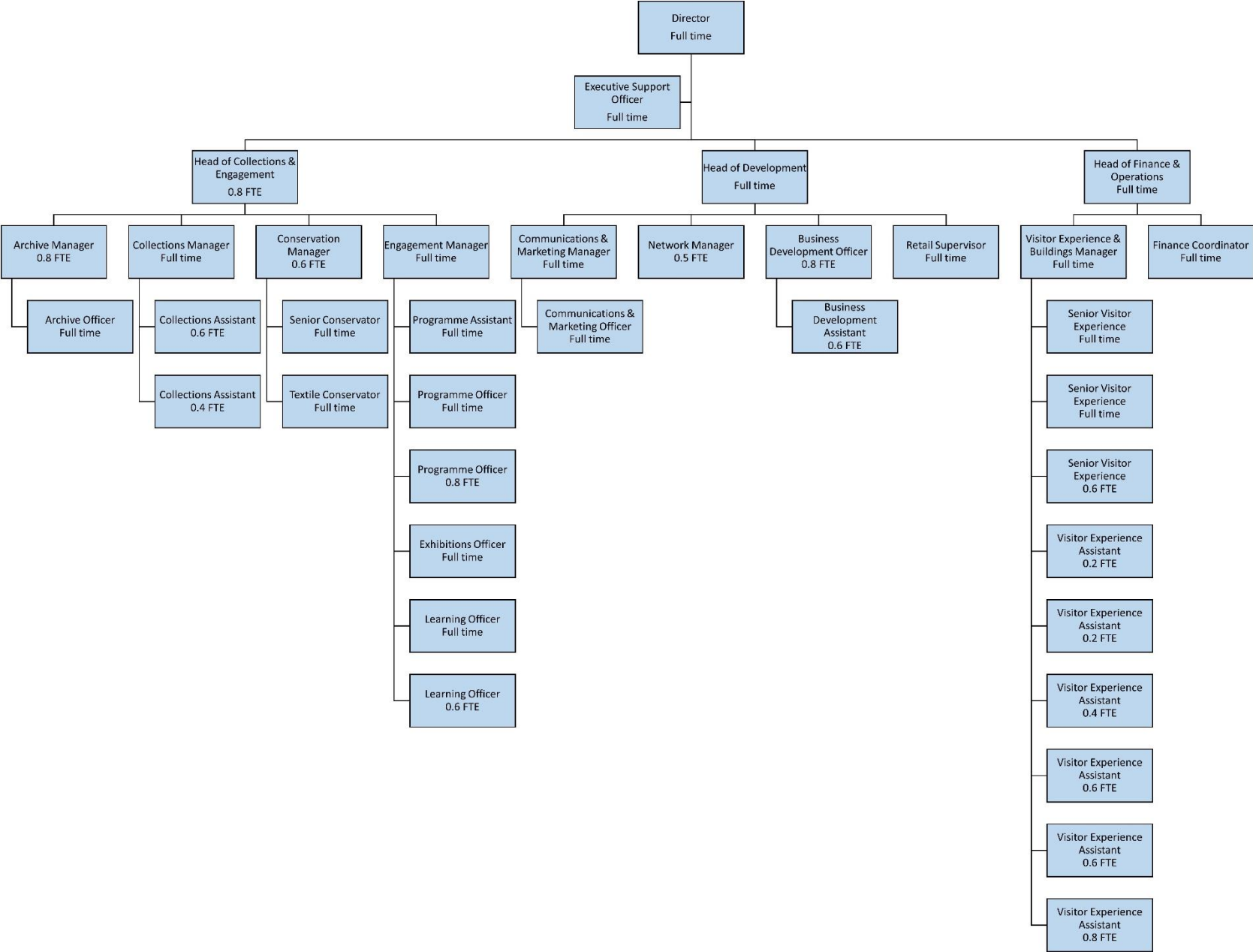
<i>accurate up-to-date data.</i>	Some digital training completed and ongoing as part of training plans. Digital working group established combining trustees and colleagues.	Audience testing and focus groups as new sources of data, Exploit technology to maximise our communications impact <ul style="list-style-type: none"> - Explore ways to engage new audiences e.g. young people - Use targeted ads 				
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ENVIRONMENTAL RESPONSIBILITY						
PHM WORKING GROUP: Priority 2: Environmental action						
Element	Current Strengths	Development areas	Actions	Timeline	Evidence and data	PHM Business Plan Aims and Priorities
Understanding the data <i>We use good quality data to understand our environmental impact and to develop a strategy to mitigate that impact.</i>	Existing reporting for Julie's Bicycle Staff training and awareness with a number of staff attending Carbon Literacy training sessions and completing programmes SLT with leadership responsibility for Priority 2 – Head of Finance and Operations Interdisciplinary working group established which aims to leverage existing skills and knowledge as well as sharing learning across teams	Baseline information for PHM – analysis of baseline carbon footprint and creation of carbon budget, ensuring PHM has accurate information to support decisions and improvements Using environmental data to make decisions about future work and ensuring data is at the heart of PHM's Environmental Strategy Carbon literacy train-the-trainer to be completed by two working group members then rolled out so basic understanding of carbon data is universal within PHM	Review of current environmental data being captured and identifying what else we can collect Development of an internal carbon budget for reporting and monitoring data Train-the-trainer to be completed as soon as possible	April 2022 – March 2023 April 2022 Jan – April 2022 (depending on course dates)	Julie's Bicycle reporting on energy, waste and water Carbon budget and baseline carbon footprint data	Priority 2: Environmental Action
Plan, Action and Change <i>Our environmental strategy is a core part of our</i>	Revised Environmental Strategy and Action Plan in place PHM staff undertaken carbon literacy training, to be rolled out throughout organisation	Keep Strategy and Action Plan updated annually Embedding environmental priorities within PHM training plan	Trustee representatives participate in Environmental priority group	Jan 2022 onwards	PHM Environmental Strategy and Action Plan 2022	Priority 2: Environmental Action

<p><i>business planning. It is supported by an action plan with relevant actions and targets that reflect our commitment to Environmental Responsibility. We are able to demonstrate positive change via the actions in our strategy.</i></p>	<p>SLT member completed Journey to Net Zero programme with Growth Hub and Museums Carbon Literacy with Museum Development North West</p> <p>Priority working group established</p>	<p>Embedding environmental change and impact in Board Meetings and reporting</p> <p>Engaging all staff and volunteers in direct action they can take around the museum site and in the community</p> <p>Ensuring environmental priorities feature within all other internal policies (including fundraising, engagement and interpretation, collections)</p> <p>Ensuring sustainability considerations are evidenced for all significant expenditure, particularly relating to purchase of goods, materials, or building-related services</p>	<p>Review and update Environmental strategy and action plan – sign off by Board</p> <p>Roll out environmental policies for inclusion in all other PHM policies as a standard section</p> <p>Ensure all staff have objectives for Environmental Action included in their annual reviews</p> <p>PHM continued membership of Greater Manchester Arts Sustainability Team (GMAST)</p>	<p>April 2022</p> <p>April 2022 – March 2023</p> <p>October 2021 and April 2022</p> <p>Ongoing</p>		
<p>Influence, Education and Advocacy</p> <p><i>We consider the way that the work we commission and present can help support our commitment to environmental responsibility and provoke debate. We share the experiences and outcomes of our</i></p>	<p>Previous work as part of Protest Lab in 2019 – added to PHM collections in this area and built local relationships with partners</p> <p>Work with children and young people with focus on environmental action</p> <p>Partnership with Open Kitchen as café and catering provider – with strong opportunities to collaborate on food waste, food poverty and sustainable campaigning messages</p>	<p>Explore idea and plans for a future major engagement theme around Environmental Action at PHM – with PHM focus on protest and activism – working with local and national partners on an impact-led arts campaign</p> <p>Continue to develop relationship and partnership with Open Kitchen – seeking opportunities to promote sustainable and environmental messages and campaigns as part of communications and engagement work</p>	<p>Discussion as part of Engagement Strategy for future plans for theme on Environmental Action</p> <p>Open Kitchen partnership to feature within Development and Enterprise workplans (led by Head of Development)</p>	<p>March 2023</p> <p>April 2022 – March 2023</p>	<p>PHM collections related to environmental campaigning</p>	<p>Aim 1: Impact-led engagement</p> <p>Aim 2: Celebrating our stories</p> <p>Priority 2: Environmental Action</p>

<i>environmental journey with our team, partners, stakeholders and the public as part of our advocacy.</i>	Connections with other sustainability advocates and leaders within the cultural sector in Manchester, e.g. MDNW, Home, Royal Exchange	Proactively look for and embrace opportunities to share our own environmental journey	Identify what PHM's environmental "identity" will be – what makes us unique. Continue to share best practice with other environmental and sustainability champions within the sector			
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6. Staff structure



7. Trustee biographies

Bernard Donoghue (Chair of Trustees)

Bernard Donoghue has been the CEO of the UK's Association for Leading Visitor Attractions, since September 2011 following a career in advocacy, communications, and lobbying, latterly at VisitBritain. ALVA is the principal advocacy body for the most important and significant museums, galleries, palaces, stately homes, cathedrals, heritage sites, gardens, zoos, performance venues and visitor attractions.

In 2017, the Mayor of London, Sadiq Khan, appointed Bernard to be the Mayor's Ambassador for Cultural Tourism and a member of the Mayor's Cultural Leadership Board. He is Co-Chair of the London Tourism Recovery Board, tasked with the sustainable recovery of London's visitor economy, created in February 2021.

He was Chair of LIFT, the award-winning London International Festival of Theatre between 2010 and 2021, and was a board member from 2005. He appointed four of the organisation's six CEOs and Artistic Directors.

He was appointed Chair of the Board of the Bristol Old Vic, the oldest continually working theatre in the English-speaking world, in June 2021.

In November 2021 he was elected Chair of the People's History Museum, the Museum of Democracy, having been a Trustee since 2018.

In January 2022 he became Chair of the London and South East Regional Advisory Board of the National Trust, the Trust area with the most members and most properties, 1,300 staff and 11,000 volunteers.

He is a former trustee of The Museum of The Home, London; the Heritage Alliance; Kids in Museums; and Centrepont, the youth homelessness charity. He was a founder trustee of the international LGBTQ Kaleidoscope Trust. He has been an appointed member of the Cathedral Council of St Paul's Cathedral, London, since 2009.

He has been a member of the UK Government's Tourism Industry Council, advising Ministers on all matters relating to domestic and inbound tourism, since 2016.

In 2020 he was named by Bloolooop as one of the world's 50 most influential people in museums, and in July 2021 won the public vote for the COVID Special Recognition Award from the UK Museums and Heritage Awards for his service to, and leadership of the museums and heritage sector in the UK during the pandemic.

Lord Steve Bassam (Vice Chair)

Steve Bassam has spent most of his working life as a servant of the labour movement as a politician and official. He worked for Camden Council and then the Greater London Council (GLC) as a senior researcher from 1983 until 1986, he also worked at London's Strategic Policy Unit. For ten years he worked for the AMA and then the Local Government Association (LGA) as an Assistant Secretary. He briefly worked for KPMG and Capita prior to joining the government in 1999.

From 1983 until 1999 he was a Councillor for Brighton and Brighton and Hove City Councils. For 13 years he was local political leader and led the creation of the successful unitary council in 1996. During his time as leader the city was transformed and Brighton and Hove regenerated into the vibrant city by the sea it now has a reputation for. He unsuccessfully contested Brighton Kemptown in 1987.

Steve was created a life peer in Tony Blair's first peers list in 1997 and became a minister in 1999 and Labour's Chief Whip in the Lords in 2008. He has been a member of the Shadow Cabinet since 2010 and has helped develop Labour's effective use of the Lords in opposition.

Educated at Clacton Secondary Modern School, Colchester Technical College and Sussex and Kent Universities, Steve has a History degree and an MA in Social Work. He has a lifelong interest in labour history.

Kay Carberry

Retired, Assistant General Secretary, Trades Union Congress (TUC)

Kay Carberry was Assistant General Secretary of the TUC until March 2016. During her career at the TUC Kay worked across a wide range of policy areas and served on a number of government advisory bodies and commissions on equality, education, training and employment. These included the Women and Work Commission, Equal Opportunities Commission, and Equality and Human Rights Commission. She is currently a Commissioner of the Low Pay Commission, a board member of Transport for London, a director of TU Fund Managers, an alternate member of the Takeover Panel and an Honorary Fellow of St Hugh's College, Oxford University.

Kay was awarded a CBE in 2007 for services to employment relations.

In the late 1980s, together with former TUC General Secretary John Monks, Kay was responsible for the TUC's role in the process that led the People's History Museum (then the National Museum of Labour History) moving from London to Manchester.

Councillor Adele Douglas

Manchester City Council

Councillor Douglas is nominated by MCC as a Trustees on PHM's Board

Steven Lindsay

Kay Johnson Gee

Steven is an adopted Mancunian originally from Glasgow. He is an accountant by training and a corporate finance advisor by profession, most recently with Kay Johnson Gee in Manchester.

Steven is a lower league football fan, lapsing football player and ardent music gig attender. He has been involved in organising music based fundraising events for People's History Museum, Salford Lads Club, Amnesty International, Musicians without Borders and Women's Aid. He is also a Trustee at Omega Research Foundation and Vice President at Forever Manchester charity.

Steven is Chair of PHM's Audit and Risk Committee.

Dave Luckin

Head of Community Funding & Impact, The Co-operative Group

Dave leads development and delivery of community investment at the Co-op – one of the world's largest consumer co-operatives, with sales of £11bn+ and more than 4 million members.

He is responsible for £25m+ annual investment, ranging from more than 4,500 grants to local community organisations, to major community partnerships and fundraising for Co-op's national charity partnership to support mental wellbeing with Mind, SAMH & Inspire.

Dave's career spans the private sector, community sector and academic research and he has leadership experience in diverse fields including community investment, sustainability reporting, member and community engagement, and responsible business consultancy.

He was awarded a PhD in sustainable development and environmental taxation from Nottingham Trent University.

Dave is also a Director of PHM's Trading Company.

Victoria Phillips**Previously Head of Employment Rights (Client Relations), Thompsons Solicitors LLP now retired**

In 1921, Harry Thompson stood with Poplar Councillors against unfair tax and launched a law firm dedicated to campaigning for social justice and reform. One hundred years later, Thompsons Solicitors still campaigns for social justice and acts for many of the major trade unions and their members.

Victoria worked for Thompsons from 1994 – 2022 specialising in trade union and employment law. She was involved in a number of leading cases involving the law of industrial action, working time and transfers of undertakings.

She previously worked for the Labour Party as National Women's Officer (1988-1993) and was President of the National Union of Students (1986-1988).

Victoria lives in North London and is a Trustee of the Park Theatre

Matilda Quiney**Head of Management Services Administration, TUC**

Matilda is Head of MSAD, the Department of the TUC responsible for support services and the Congress Centre.

Matilda worked in the Research Department of the GMB between 1993 and 2003, becoming Deputy Director of Research in 1997. She lobbied for improvements to employment rights and supported reps seeking to improve on the law in the workplace. Matilda then moved to the civil service, working in various departments as a senior civil servant.

She worked on the Women and Work Commission, Fuel Poverty and as PPS to the Leader of the House of Commons as well as in various corporate roles. She also spent a year working on secondment for British Gas.

Matilda moved to the Labour Party in 2013, working for the deputy leader of the party. She undertook some consultancy projects before coming to the TUC in 2015.

Katherine Savage**EY Partner, Financial Services People Advisory Services**

Katherine has extensive experience creating effective reward and HR strategies across leading FS global organisations. A large proportion of her career having been spent within emerging markets and organisations in periods of unprecedented change/crisis management.

She has significant experience in working with Boards and Executive Committees, bringing deep expertise of understanding evolving regulatory expectations. 20+ years of leading in HR in Financial Services, managing Organisation Design, transformation, learning, regulatory alignment, reward and cost optimisation.

Currently her main focus is on the creation of Talent & Reward Strategies, building capability frameworks aligning to Work Reimagined and Future of Reward. Encompassing the need to better consider societal purpose and long term value creation. She enjoys leading and being a disruptive voice on Diversity & Inclusion, working with clients to accelerate their focus on developing a culture driven by inclusive leadership behaviours to leverage differences to achieve business results.

Katherine enjoys spending time in Cornwall with family and friends; fresh air, sea food and perfecting her surfing.

Councillor Rob Sharpe**Salford City Council / Greater Manchester Combined Authority (GMCA)**

Rob Sharpe is a Salford Councillor for Little Hulton who has enjoyed a wide range of functions as an elected member of Salford City Council, most notably in health and planning. He is a former student of The University of Salford with a First Class Honours Degree in Politics and a history of activism within the Trade Union and Labour Movements. He has 12 years' experience working in the public sector working in housing, leisure, community engagement, and public health across four authorities in Greater Manchester. Bolton born, he now lives in Walkden and was educated at Walkden High School and Eccles College.

Rob is passionate about advancing equality and diversity across all protected characteristics but most notably for the BAME community.

In his spare time, he enjoys playing and watching sport and jazz music.

Councillor Sharpe is nominated by GMCA as a Trustee on PHM's Board

Suzie Thompson

Director of Development and Alumni Relations, University of Liverpool

Suzie Thompson is Director of Development and Alumni Relations for the University of Liverpool having previously held that role at the Royal Northern College of Music (RNCM) in Manchester for seven years. Suzie has been a fundraiser for over fifteen years and is passionate about the role philanthropy can play in changing lives and widening access. At the RNCM she was a member of the Executive Committee and Chair of the Student Awards Committee and Equality, Diversity and Inclusion Forum.

Her various volunteer roles include trustee of the People's History Museum and a volunteer coach for Queen Bee Coaching. Suzie is a Fellow of the British American Project.

Raj Tulsiani

CEO & Co-Founder, Green Park

Raj Tulsiani has become one of the UK's leading figures in executive search, interim management, workforce planning and diversification. He has over 20 years of experience moving the dial on leadership, talent and diversity and is the author of 'Diversity and Inclusion for Leaders: Making a Difference with the Diversity Headhunter.'

As one of the most respected and disruptive figures internationally in these fields, Raj advises boards and change agents across the public and private sectors on diversity and talent. He sits on a number of boards including the Met Police.

As the leader of one of the recruitment industry's few minority-owned businesses, Raj is a passionate advocate of the power of diversity as a source of competitive advantage, leading a team that sets the benchmark for innovation and commitment to consistently attracting and retaining diverse groups of appointable leadership candidates.

Under his leadership, Green Park has become an award-winning consultancy at the forefront of client and candidate service and innovation. In 2019, Green Park featured in the Financial Times' list of 1000 Fastest Growing Companies and was the only recruitment agency to feature within the Sunday Times Virgin Atlantic Fast Track 100, ranking Britain's fastest-growing private companies.

Regarded as a champion for entrepreneurialism within the UK, in 2018 Raj was most awarded Entrepreneur of the Year by both the MSDUK Awards and Recruitment International Awards and named in The EMpower 100 Ethnic Minority Executives List, presented by the FT. Other awards include Best Agency Recruitment Lead of the Year, a Lifetime Diversity Achievement Award and winning the Lord Noon Award at the Global Equality & Diversity Awards 2017.

Before co-founding Green Park, Raj was the first ethnic-minority manager at Michael Page, growing a start-up team to £10 million and was on the Executive Board at Penna, growing a start-up function to £14.5 million.