

Lichfield City Council

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Town Clerk: Anthony Briggs

TB/JW/J1/2
15 March 2018

To: Members of the Johnson Birthplace Advisory Committee

Councillors R Awty, Mrs G Boyle, J Brooks, C Spruce, A Thompson and R Yardley

Representative of Johnson Society

Mr P Jones

Also to:

Museums and Heritage Officer (Joanne Wilson)

Dear Committee Member

Johnson Birthplace Advisory Committee

You are invited to attend a meeting of the Johnson Birthplace Advisory Committee to be held in The Moulton Room, Guildhall at **10.30am on Thursday, 22 March 2018.**

Yours sincerely

Town Clerk

Apologies for Absence

AGENDA

1 MINUTES

To confirm as a correct record the Minutes of the Meeting held on 3 October 2017 (**copy attached**). [Minutes adopted by City Council on 23 October 2017].

2 FORWARD PLAN 2018-2021

To consider the Forward Plan 2018-2021, attached at **Appendix 1**. This updates the last full plan from 2015-2018.

RECOMMENDED: That the Forward Plan 2018-2021 be adopted.

3 ENVIRONMENTAL POLICY STATEMENT

To consider the enclosed Environmental Policy Statement, attached at **Appendix 2**. This is an update to the 2015 policy statement, a document required by Arts Council England's Museum Accreditation scheme.

RECOMMENDED: that the updated Environmental Policy Statement be adopted.

4 MUSEUM STAFF

In February 2018 three new members of staff joined the Museum team. New Attendants, replacing David Titley and Janet Hill-Gibbs who retired in winter 2017, are Nigel Hunt and Christine Genders. Nigel brings 7 years of experience as a collections volunteer at the Birthplace Museum and a welcomer at the Guildhall Cells. Christine is a qualified teacher, and a storyteller and dramatist, who also brings experience of welcoming at Lichfield Cathedral. Penny Taylor is the Museum's new Administration Assistant, in a new post working office hours Monday – Thursday. Penny is a recent History graduate with work experience in Museums and customer service.

RECOMMENDED: *That the report be noted.*

5 DR JOHNSON'S BIRTHPLACE TRUST CO-OPERATIVE BANK ACCOUNT

In 2013 a community bank account was opened with the Co-operative Bank for Dr Johnson's Birthplace Trust. The account was originally opened in order to transfer the remaining balance of the Blum Fund (£6,190.66), a purchasing and collection care fund raised from the sale of duplicate books from the bequest of Daniel Blum in the 1990s. The Trust bank account also allows occasional donations from individuals to the Trust to be accepted, either directly or via CAF (Charities Aid Foundation) and would allow for gifts and bequests to be made to the Trust in the future. Since 2013 a small number of such donations have been received, and the balance currently stands at approximately £6,800. The Trust account money is intended solely for acquisitions to the collection and for caring for the existing collection. No purchases have been made from the account to date.

A suggested procedure for use of the account is as follows:

- Signatories on the account to be the Town Clerk, Deputy Town Clerk, Chairman of the BAC and Deputy Chairman of the BAC. Cheques require two signatures, one to be an Officer and one to be a Councillor
- The Town Clerk and Museums & Heritage Officer be granted delegated authority to make purchases or commission conservation work for items under £500, and such purchases be reported to the BAC meetings. The £500 maximum being in line with existing procedures for the city council's Imprest account,
- Any purchases or commissioned work over £500 to be approved at BAC meetings.
- An exception to this would be any time-sensitive opportunities to purchase significant items for the collection, where an emergency meeting would be convened, decisions taken to full council, or permission would be sought by members in correspondence, depending on the time available in individual cases.
- Account activity to be monitored and audited as currently by the Internal Auditor.

RECOMMENDED: *that the suggested procedures for use of the Birthplace Trust bank account be adopted.*

6 DE-ACCESSIONING ITEMS OF FURNITURE

To consider the report on the proposed disposal of four items of furniture, attached at Appendix 3.

RECOMMENDED: *i) that permission be granted to dispose of the identified items from the Birthplace collection, and ii) that the Museums & Heritage Officer carry out professional methods of removing these items, adhering to the guidelines within the Museums Association's 'Code of Ethics'.*

6 DEVELOPMENT PROJECT

Verbal report from the Museums & Heritage Officer on the Museum's Development Project, following the Birthplace Advisory Committee's workshop with consultants Susan Dalloe and Huw Owen on Wednesday 14th March 2018.

RECOMMENDED: that the report be noted.

7 DATE AND TIME OF NEXT MEETING

In the Calendar of Meetings as 10.30am on Tuesday 6 November 2018.

8 ANY OTHER URGENT OR NECESSARY BUSINESS AT THE DISCRETION OF THE CHAIRMAN.

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Lichfield City Council

Minutes of the Johnson Birthplace Advisory Committee Meeting held in The Moulton Room, Guildhall at 10.30am on Tuesday 3 October 2017

PRESENT:

Representing Lichfield City Council: Councillor R Awty, and Councillors Mrs G Boyle, T Matthews, C Spruce, A Thompson and R Yardley.

Representing Johnson Society: Mr P Jones

In Attendance: Joanne Wilson (Museums & Heritage Officer)
Tony Briggs (Town Clerk)

Apologies: None

43 MINUTES

RESOLVED: *That the Minutes of the Meeting held on 23 March 2017 be confirmed as a correct record.* [Minutes adopted by Council on 24 April 2017.]

44 MUSEUM ADMISSIONS 2015/2016 (ANNUAL REVIEW)

Members considered the Museum and Heritage Officer's report (Agenda Appendix 1), together with a revised Monthly Visitor Numbers chart, noting in particular the increase in level of donation per visitor and the increased attendance during the summer months that was boosted further by the varied and extensive programme of family activities at the museum.

RESOLVED: *That the report be noted.*

45 MUSEUM ATTENDANTS

The Museums and Heritage Officer informed Members that both David Titley and Janet Hill-Gibbs would soon be retiring from their positions as Birthplace Attendants.

RESOLVED:

- a) *That the Town Clerk write to both David Titley and Janet Hill-Gibbs to highlight the City Council's appreciation for their contribution to the Birthplace Museum.*
- b) *That the Committee supports the view that five Attendants is the optimum number for the Birthplace currently*
- c) *That the City Council's Staffing Committee is requested to give consideration to the replacement of the two retiring Attendants at its meeting of 2 November 2017.*

46 PART-TIME MUSEUM ADMINISTRATION ASSISTANT

Members considered the Museum and Heritage Officer's report and the draft job description for the role (Agenda Appendix 2).

RESOLVED:

- a) *That the Committee approve the draft job description*
- b) *That the Committee requests that the creation of the post and related job description be considered by the City Council's Staffing Committee at its meeting of 2 November 2017.*

47 LOANS TO DOCTOR JOHNSON'S HOUSE, LONDON

Members considered the items loaned to Dr Johnson's House at Gough Square (Agenda Appendix 3) and the delegated powers utilised to facilitate arrangements due to time constraints. Members suggested it may be appropriate for a delegation from Lichfield to visit the exhibition.

RESOLVED: *That the loan of the items contained at Agenda Appendix 3 to Dr Johnson's House in Gough Square be supported; and the powers utilised to facilitate arrangements be noted.*

48 REDEVELOPMENT PROJECT UPDATE: ACCESS AUDIT REPORT

Members considered the report prepared by Ann Johnson of Wave-length Social Marketing CIC. Members were in broad agreement with the conclusions drawn and recommendations made and noted that as a Grade 1 listed building, the duty to preserve its integrity must be retained above all other considerations, but that this did not preclude making access and visitor experience for those with disabilities as pleasurable and wide ranging as possible.

The Museums and Heritage Officer informed Members that a companion report should be completed in readiness for the next meeting of the Committee.

RESOLVED: That the report be noted; and suggested actions be implemented or investigated further by the Museums and Heritage Officer as applicable.

42 DATE AND TIME OF NEXT MEETING

In Calendar of Meetings as 10.30am on Thursday, 22 March 2018.

**THERE BEING NO FURTHER BUSINESS
THE CHAIRMAN DECLARED THE MEETING CLOSED AT 11.13 AM**

BIRTHPLACE ADVISORY COMMITTEE: APPENDIX 1



**The Samuel Johnson
Birthplace Museum
Forward Plan 2018 – 2021**

The Samuel Johnson Birthplace Museum Forward Plan 2018 – 2021

Date of approval by LCC: **To be added**

Date of full review: **March 2023**

1. Introduction

The Samuel Johnson Birthplace Museum (SJBm) in Lichfield is a Grade I listed 18th century townhouse which has been a public museum dedicated to Samuel Johnson since 1901. The SJBm Forward Plan details the current situation of the museum, reviews the previous plan and states the aims and objectives for the museum over the coming three-year period, drawing upon consultation with users. The plan is approved by the Birthplace Advisory Committee of Lichfield City Council (LCC), the minutes of which are then approved by full council (see 6.i). The aims and objectives are updated annually and presented to the Committee and the full plan updated every three years.

2. Museum Statement of Purpose

The covenant under which the building was purchased by LCC in 1900 remains the fundamental mission of the museum, namely:

“...to remain in perpetuity as a memorial to the life, work and personality of Samuel Johnson, his Lichfield connections and his friends and contemporaries.”

The current service objectives of LCC expand this intention to include users and development:

“...to stimulate wider interest in and understanding of the life and achievements of Samuel Johnson. To safeguard the future and development of the museum and its collection to enable access by all.”

3. Review of Forward Plan 2015-2018

A number of developments and goals have been achieved since the last plan was written (see section 8 for full details) including increased staffing, university partnerships, temporary exhibition projects, establishing an external collection store at Donegal House, a number of new clubs and groups, an access audit and the beginning of a major redevelopment project. Items which have not been achieved to the timescales initially indicated include improvements to displays, research into access and facility improvements, all of which will be addressed within the current redevelopment project.

4. Development of this Plan

The SJBm Forward Plan 2018-21 has been updated with consideration of the following sources of consultation: user comments taken from visitor books, comments boxes, exit surveys and online reviews; consultation sessions with Museum Attendant staff; volunteer comments box; report from a young people's 'museum mystery tour'; Access Audit of the Museum, and minutes of the Birthplace Advisory Committee meetings. Feedback from all sources was reasonably consistent and fell into general categories of: developments to existing displays, particularly interactive and sensory elements; improvement of access to building and collections; engaging with local community and improving the number of school and adult group visits.

5. Monitoring this Plan

Progress towards the actions identified in this plan will be monitored in monthly reports by the Museums & Heritage Officer (MHO) to LCC, and at the bi-annual Birthplace Advisory Committee meeting. Implementation of the plan is the responsibility of the MHO and milestones will be set to assist with measuring progress.

6. Situation Review

i) Governance & Organisational Structure

The SJBm building and its collection are vested in the Dr Johnson Birthplace Trust, of which LCC is the sole trustee. The administration of the Museum, including the employment of staff, is undertaken directly by the Council through its powers under sections 144 and 145 of the Local Government Act 1972. The MHO reports to Town Clerk of LCC, and represents SJBm at Birthplace Advisory Committee meetings.

ii) Staff & Volunteers

8 staff members (2.8 full-time equivalent) are employed and recruited directly by LCC: a full-time MHO (37 hours a week); A part-time Museum Administration Assistant (22 hours a week), five part-time Museum Attendants for weekday and weekend cover of the entrance and bookshop, and occasional events, tours and school visits (equivalent to 35 hours a week November - February, 45.5 hours March-October) and a cleaner (6 hours a week). A team of 14 active volunteers offer a total of 18-40 hours per week depending on the season, assisting areas such as collections documentation, care and research, running clubs and groups and preparing for special events.

Attendants have completed 'Welcome to Excellence' training and a culture of customer care is maintained through regular informal refresher training and daily checklists. Induction training is offered to all staff and volunteers and any external training available is highlighted; in-house training and development sessions are held for Museum Attendants every four months with training needs identified in consultation. Volunteer role descriptions and agreements are in place and handbooks are provided. A succession plan is in development, and LCC Staff Duty notes detail the main MHO tasks.

iii) Building, Interpretation & Access

The house was built for Johnson's parents in 1707, and is Grade I listed. It remained in Samuel's possession until his death in 1784 and went into private ownership until it was donated to the city in 1900. The last full update of the museum displays was supported by EC funding in 1989/90. A more prominent entrance on Market Street was re-established in 1992 to improve visitor flow. A new room devoted to Johnson's *Dictionary* opened in 2005, a full repaint of the exterior was carried out in 2009 and the Museum bookshop and entrance was updated in 2014. Under the care of LCC the Birthplace benefits from a quinquennial building inspection.

Five floors of displays are open to the public comprising a bookshop and entrance area, two period room displays, an audio-visual room, eight rooms of Museum display and a library area available to researchers by appointment. The interior remains atmospheric with a mixture of interpretation including text panels, interactive and hands-on displays. Improvements to interpretation and developing access to the stored collection are underway as part of a large redevelopment project, in initial review and consultation stage in early 2018.

The tall and narrow building has steps to the entrance and many unavoidable stairs. A good provision of audio support and large print information has been established, and an access audit in 2017 has provided a structure for further development. Physical access issues have been addressed to date with a virtual tour available online and an outreach provision, and developments to access are included in the redevelopment project. See the SJBm Access Policy Statement (2017) for more information.

iv) Public Opening & Facilities

The Museum is open to the public seven days a week, currently 10.30am-4.30pm March to October and 11.00am – 3.30pm November to February, with closure only on Christmas Day, Boxing Day and New Year's Day. The Museum lacks a designated car park, visitor toilets or a refreshment provision. This is compensated by ample car parking within a very short distance, including disabled car parking spaces

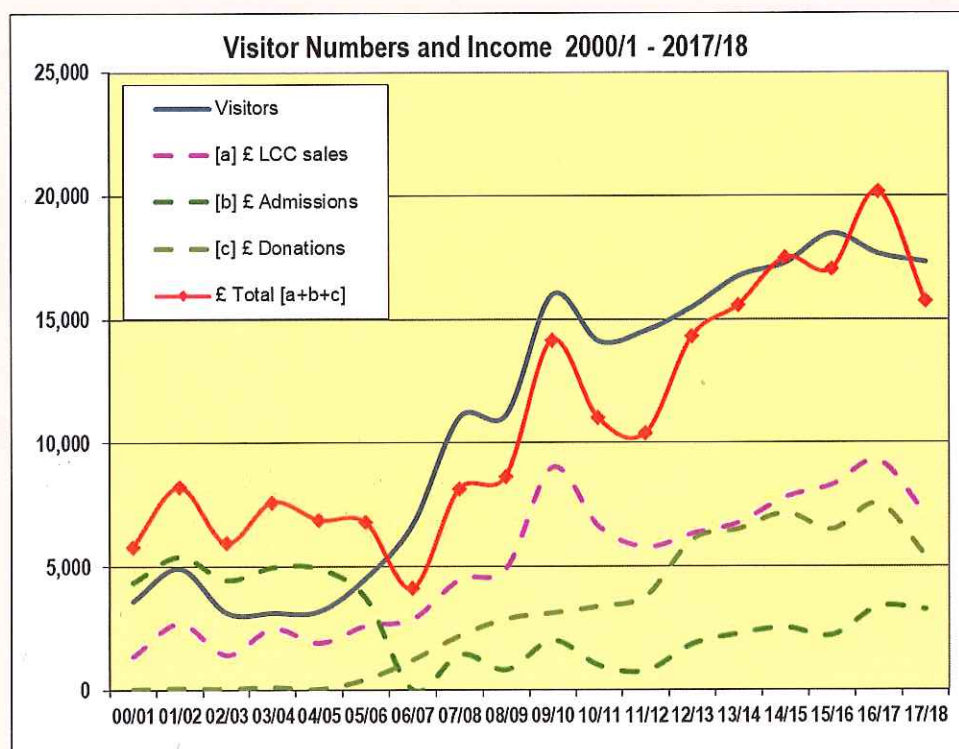
within fifty metres of the entrance, and other facilities very close to the building. Since 2016 a casual agreement has been in place with neighbouring café Devotea to allow visitors access to toilets. However, lack of facilities in the building is a barrier for evening events and income generation. The SJBM Bookshop is a popular facility and attracts regular local users. The Wood Library provides an atmospheric study room for researchers, but available space is limited.

v) Audience

SJBM welcomed 18,300 visitors in the 2017 calendar year. A consistent, gradual decline in visitor numbers since the early 1990s prompted LCC to introduce free admission in October 2005, with immediate positive effects on visitor numbers. The celebration of Johnson's tercentenary in 2009 saw a large increase to 16,000 visitors. The following two years saw a slight drop following these unprecedented numbers but have since steadily.

SJBM offers users the opportunity to provide feedback and draws data on users through a visitor book, exit surveys and comments cards. Recent visitor data analysis has identified the main user groups as coming from further than 15 miles away (54%, 8% of which were from London), followed by local visitors (27%) and international visitors (19%). Local visitors are therefore the current target for audience development, to be guided by non-user consultation, but this group has seen a 4% increase in the last three years. Over 60s represent the largest visitor group and family groups are increasing. Young people are the smallest visitor group, but a consultation visit in 2014 has provided excellent feedback to develop new interpretation experiences for this age group which will be considered within the current redevelopment project. Visitors rated their experience very highly, with 91% of respondents rating SJBM 8 or above out of 10. Individual aspects of the Museum were all routinely rated excellent, with the exception of external signage, ease of finding the Museum and access to cafes and toilets.

School visits see a steady average of c.400 pupils a year visiting since the 2012 launch of the programme. It is hoped that the number of visits can be improved. SJBM also offers a range of informal learning activities including a children's book and writing club, adult book, poetry and creative writing clubs, and life-long learning with Latin classes.



*(‘Sales’ here refers to gross souvenir and new book sales, not all second-hand sales. Please see table 1 for full net sales figures
Data for the 2017-18 financial year is incomplete)*

vi) Environmental Sustainability

SJBM has made a commitment to reducing its environmental impact, as outlined in the Environmental Sustainability Policy Statement (2018). SJBM has been a member of the West Midlands Green Museums Project since 2012 and has decreased energy use after entering the scheme through light zoning, a replacement boiler and increasing insulation with new window blinds. An 'Environmental Action Plan' is in place and updates are ongoing, and sustainability will be considered during the redevelopment project plans. As much waste as possible is recycled and single-use plastic use is being reduced. SJBM also sources recycled goods where possible, and is a supporter of the local Fair-Trade initiative.

vii) Funding

LCC provides funding directly, or through the Dr Johnson's Birthplace Trust Account, to cover the annual operating costs of the Museum (see Table 1). The expenditure for 2017/18 and the budgeted expenditure for 2018/19 are outlined below (for simplicity, these figures combine both LCC and Trust income/expenditure elements). There is no expectation that this funding will be reduced or withdrawn in the following two-year periods.

Net Expenditure	*17/18 Actual	18/19 Budget
Employee costs	59,619	64,887
Central administration*	12,156	11,070
Repair & Maintenance	3,590	3,810
Energy	3,050	3,150
Rates & Water	1,020	1,050
Supplies & Services*	16,500	12,300
Promotion	2,000	2,000
Sales (net)	-6,820	-6,820
Admissions	-3,280	-3,280
Grants/Donations	-7,730	-7,730
Net Expenditure	80,105	80,437

Table 1: Samuel Johnson Birthplace Museum net expenditure.

*[*2017/18 figures are "revised outturn"]*

*[*Insurance of buildings and collections is included in the Central Administration budget]*

*[*Collection care and conservation work is included in the Supplies & Services budget heading]*

Donations have increased significantly since the abolition of admission charges. The drop in standard museum admissions income has been lessened by the introduction of a calendar of regular special events with an entrance charge, and admissions income gained from guided tours and schools groups. These charges, in addition to the considerable increase in sales and donations, have meant that overall Museum income has increased considerably since the introduction of free entry, but it is hoped to improve school and group visit numbers.

The Blum Book Fund provides a small purchase fund for book acquisitions and collections care, and the Johnson Society of Lichfield also hold a small fund to which SJBM can apply to support care of the Birthplace collection. LCC also provides a 'Repairs and Renewals' fund in addition to standard SJBM operating budgets to be used for building care projects.

viii) Collections

The Museum collection has been gradually acquired since 1901 and includes over 8,000 items of personalia, fine art, furniture, manuscripts, books and archive material. The collection represents Johnson and nationally important figures from his circle, as well as items associated with the history of Lichfield. The collection is catalogued on a 'modes' database, with a small and decreasing documentation backlog. SJBM can soon move forward to create thorough records with detailed entries and photographs, with a view to public on-line access. For more information see the SJBM Collections Development Policy, Collections Care Policy, Documentation Policy, and the Documentation Procedural Manual and Documentation Plan (all updated 2015).

Only 2% of the collection is on loan to SJBM. 23% is presently on display, and a further 40% is readily accessible in storage on site (mainly library collections in bookcases). Presentation is of a good standard, but beginning to appear dated in some areas. A programme of replacing labels and acquiring new display stands is in place. Members of the public are encouraged to use the libraries in a page on the museum website, and volunteers and attendants are facilitated to undertake research on the collections. The limitations of the museum building have resulted in poor storage and environmental conditions for the collection in some areas, but in 2016 a dedicated store was established at Donegal House. Regular environmental and pest monitoring is in place. A Collections Health Check report formed the basis of the Museum's Collection Care Plan, updated in 2015 and due for renewal in 2019. In the 2015-18 period regular collection cleaning has been established with a new team of volunteers, some key items from the collections have been professionally conserved (including the Museum's clocks), and preparations are underway for the launch of the Museum collection online in 2018.

ix) Security

The building is well protected by a regularly maintained and externally monitored alarm system, CCTV with constant recording on site and a small number of display cases have 'break-glass' style alarms. A full review of the security of the Museum was carried out in 2015 by a crime reduction officer and recommendations were carried out, including an update to the alarm system to add additional motion sensors.

x) Location & Tourism

SJBM is situated in the heart of the historic cathedral city of Lichfield, which has a population of over 30,000 inhabitants. Benefits of the location include: being central among partner tourist attractions; featuring in the city's heritage trail; proximity to the busy Market Square; excellent connection of Lichfield to the national road and rail network and the West Midlands conurbation (approximately 17 miles north of Birmingham).

Lichfield District Council's 'Visit Lichfield' team oversees tourism initiatives for the area, estimating that 5.6 million visitors come to the district's attractions a year. SJBM works closely with 'Visit Lichfield', appearing in the local tourism guides, offering specialist group tour packages and the MHO contributes to working groups for the city's Heritage Weekend and Christmas Festival Weekends, and is a member of the Lichfield District Tourism Association executive committee and a joint marketing group for local attractions. SJBM is also a partner venue for the Lichfield Festival. LCC is involved in local strategic development such as the City Centre partnership, Neighbourhood Plan and BID, and ensures that SJBM is considered and included where appropriate.

xi) SWOT Analysis

Strengths LCC backing Eye-catching, Grade I listed building Samuel Johnson provides rich and varied subject matter for interpretation and events Accredited Museum with full-time Museum professional input Prime location in Lichfield, close to busy market, major road and rail networks Subject of Museum mentioned on city road signs and city heritage trail Trained, enthusiastic and knowledgeable front of house staff Team of volunteers support activities and development Regular consultation with staff, volunteers and users guiding development Well-stocked second-hand bookshop raising funds Free admission (excluding organised groups) Sustained increase in visitor numbers Growing number of partnership projects, e.g. community outreach, educational development programme, special events and joint marketing projects Good relationship with media and strong local reputation Increasing number of repeat visits from local families Very strong and varied collection Expanding special events programme Interesting mix of interpretation and media within displays Increasing online presence and social media following Good provision of facilities for hearing-impaired visitors	Weaknesses Access problems: building presents physical and intellectual barriers. Size of team restricts growth and development Lack of staff member to focus on education and school visits Lack of facilities, e.g. toilets, café, flexible space for education activities, car parking Environmental conditions and storage not appropriate for the collection in some parts of building Different winter/summer opening hours can cause confusion Limited space for library users Text panels and display cases are beginning to look dated since the last full re-display in 1989/1990 Running repairs for an historic building require steady expenditure Pedestrian signage to tourist attractions
Opportunities More partnership working with local Heritage attractions Joint marketing schemes working to make Lichfield a destination for longer stays Introducing online access to collections Planned city centre developments and BID group may attract more visitors to Lichfield Partnerships with local universities could attract younger audience Major redevelopment of the museum displays could be achieved through external funding Number of Heritage attractions in the city attracting visitors	Threats Economic downturn may reduce public leisure spending Dependant on LCC Funding Proposed changes to history Curriculum affecting number of school visits

The Samuel Johnson Birthplace Museum Forward Plan 2018 – 2021

7. Aims & Objectives

The following have been identified as key strategic aims for the Museum to address in the period 2018 – 2021:

i) To operate to a high professional standard, making the best use of available resources

- a) To achieve and maintain ACE Accreditation status
- b) To maximise all possible revenue streams
- c) To maximise staff development
- d) To maximise volunteering

ii) To build our audiences and respond to user consultation

- a) To attract more local, family and young visitors
- b) To monitor users and consult non-users
- c) To increase the number of school visits
- d) To increase the number of group visit bookings

iii) To develop access to the Museum and collection

- a) To improve awareness of, and access to, all parts of the collection
- b) To update interpretation and displays
- c) To improve facilities for researchers and publicise provision more widely
- d) To assess and seek alternative solutions to access limitations

iv) To care for the Museum building and collection

- a) To improve the storage and care of the collection
- b) To improve the documentation of the collection
- c) To ensure the ongoing protection of the collection against disaster
- d) To ensure the continued maintenance and sustainability of the Birthplace building

8. Work completed in 2015-2018

In addition to tasks identified as 'ongoing' and those reported in monthly officer reports to Council, activities specifically relevant to meeting the strategic aims included:

i)	Full Accreditation re-awarded March 2016 Attendant administration shifts trailed from 2015, Part-time Museum Administration Assistant post introduced 2017 New birthplace website introduced
ii)	Existing classroom based outreach activities developed into loans boxes for schools Dedicated area for planning group and schools visits included on new website Staff trained to deliver KS5 Dictionary Workshop, packs created and increased bookings Dedicated school visit, bookclub and family activity volunteers recruited Project with creative writer working with KS3 pupils and new 'Words Alive!' club started Increasing social media and mailing list following, integrated into new website Creation of Groups database to market tours and talks Young people on placements contributing to social media feeds Life-long learning programme: writing, poetry and Latin groups established 6-month student placements started as partner in University of Birmingham 'History in the Workplace' module

iii)	'Object in focus' page on new website to highlight collection items and staff/volunteer work Temporary displays including History of the Birthplace archive material, Sculpture and Garrick 300 exhibition working in partnership with Dr Johnson's House, London New family trail introduced Redisplay of Boswell's bookcase Regular library displays established New object labels developed by Keele University student placement and rolled out across displays Partnership with Keele University focussing on early researchers using collections Review and consultation underway for Museum redisplay
iv)	Redisplay of Boswell's bookcase Continued improvements to Museum storage areas and collection organisation 'Restore and Reveal' project completed (conservation, new storage, online launch) Manuscript collection fully scanned and added to modes (over 1000 individual sheets) Work on backlog of old accession and documentation material nearing completion New collections storage area established at Donegal House Collection clean with volunteer teams Improvements to alarm system following security report recommendations Lighting replaced for LED in Bookshop, Birth Room and London Life Birth Room ceiling and structural works, and redecoration Collaborated with Johnson Society to raise funding for conservation of Garrick prints Structural repairs in the Birth Room, London Life, Introduction Room and exterior completed, repairs to the roof, exterior under canopy clean and Lighting replaced in Introduction Room Access Audit undertaken

9. Current Objectives, Performance Indicators and Resource Plan

The following table gives a detailed plan of actions identified to achieve the strategic aims set out above, and includes a resource plan for these objectives. The 2018-21 strategic aims are largely financed by the everyday running costs of the Museum. (See Table 1, page 4 for a breakdown of the contribution of LCC to the running costs of the Museum, which includes the budget set for 2018/2019, monies raised from sales, admissions and donations). Where additional external funding is referred to, applications could be made to local funds such as Conduit Lands and Swinfen Broun Charitable Trusts, and West Midlands Museum Development grants, or refer to a larger series of grants which are to be identified as part of the current redevelopment project.

Target dates given refer to annual reporting periods, but monthly progress reports are made to LCC and the bi-annual Birthplace Advisory Committee meeting. Where activities are described as ongoing, updates are made in these reports.

i) To operate to a high professional standard, making the best use of available resources

Objective	How to be achieved	Achieve by	Performance indicator	Resource Plan	
				Workforce: who completes* Time: for 2015/16 priorities	Financial: relevant budgets
a) To maintain Accreditation status	Maintain Museum policy and procedures in preparation for return application	Ongoing	Accreditation awarded	MHO; Volunteers	Staff; Central Administration
b) To maximise all possible revenue streams	Update stock displays and introduce new souvenir lines, with 10% target increase per year for total spend per head	Ongoing; annual figures reported at October BAC	Rise in sales income	MAA; Attendants	Sales (the cost of new and replacement stock for sale is offset within the amount given in table 1); Staff; Promotion (marketing of events); Central Administration (mainly in-house photocopied publicity); costs of events offset by Admissions
	Maximise donation and the use of gift aid, aiming at 50p average donation per head by March 2021	Ongoing; annual figures reported in October BAC	Rise in donated income	MHO; Attendants	
	Regular programme of a least six special events per year planned, well publicised and profitable or cost-neutral.	Ongoing; season ahead schedule July & December	Rise in admissions income	MHO; MAA; Volunteers; Attendants	
	Increase group and education bookings by 20% per year (see ii.c & d)	Ongoing; annual figures reported in October BAC	Rise in group bookings	MHO; MAA; Attendants	
	Establish an improved online shop area as part of new website plans, and research options for internet second hand book sales for specialist donated stock	March 2019	New website available, sales increasing	MHO; MAA	
c) To maximise staff and volunteer development	Research possible improvements into facilities for event visitors and hirers, identify possible funding streams	October 2018	Report produced on possible ways forward	MHO; Consultants	
	Continuing regular in-house training sessions, make staff & volunteers aware of relevant training possibilities.	Ongoing, 3 sessions held annually	Minutes from training sessions; training log	MHO	Staff; Central Administration; use of free training courses offered by e.g. local MDO network. An element is included in LCC's staffing budget for employee training, or could be resourced from SJBM Supplies.
	Match volunteer and attendant staff interests to appropriate tasks and projects	Ongoing	Museum Attendants taking on varied tasks	MHO; Attendants	
d) To maximise volunteer input	Creation of 'How to' guides as part of SJBM succession planning, to enable volunteers and Attendants to take on varied tasks and roles	Ongoing	Production of guides, note in LCC report	MHO; MAA	
	Liaise with universities, colleges and volunteer recruitment centres	Ongoing	Growth in volunteer database	MHO	Staff; Central administration; Promotion (though advertising would ordinarily be through free of cost channels e.g. local volunteering centre)
	Targeted recruitment for volunteers to work with specific areas and projects when places vacated (especially schools and marketing)	Ongoing	Growth in volunteering numbers, note in LCC report	MHO	

ii) To build audiences and respond to user consultation

Objective	How to be achieved	Achieve by	Performance indicator	Resource Plan	
				Workforce: who completes* Time: for 2015/16 priorities (approx. working days)	Financial: relevant budgets
a) To attract more local, family and young visitors	Develop a targeted 'locals' advertising campaign	March 2019	Analysis of user data	MHO; MAA; Volunteers	Staff; Promotion (though free newspaper editorial is to be sought); Central Administration; costs of events offset by Admissions; LCC planned additional funding for new websites
	Develop special events to appeal to a wide range of audiences, including free of charge events/activities.	Ongoing; season ahead schedule July & December	Events leaflets, note in LCC reports	MHO; Attendants	
	Ensure that the museum and all special events are well and widely publicised locally, maintaining strong links with local media. bi-annual leaflet, posters and press releases 1 month ahead of events.	Ongoing	Note in council reports; increased user numbers	MHO; MAA	
	Make wider use of social networking and social media to advertise museum and connect with younger audiences	Ongoing; 2 posts/tweets per week	Rise in social media users	MHO; MAA; Volunteers	
	Develop interpretation, displays and interactives to appeal to a wide audience, including responding to youth consultation held in 2014 (see iii.b)	Ongoing; to be considered within re-display project	Improved displays, note in LCC report	MHO; Consultants	
b) To monitor users and consult non-users	Recruit young volunteers through local schools and colleges to develop areas such as social media (see also i.d)	Ongoing	Increased volunteer numbers and social media users	MHO	
	Carry out an effective survey to be completed by visitors, and regularly compile statistics	Annually; data compiled in January and reported	Production of statistics	Attendants; Volunteers	Staff; Central Administration (photocopying surveys); Supplies for additional resources for street surveys
	Identify and conduct market research with non-user groups including focus groups, questionnaires and interviews to help shape future plans for the museum	Ongoing, street consultation by March 2019	Production of report on results, note in LCC report	MHO; Volunteers; Attendants	
c) To increase the number of education visits	Maintain a database of school contacts and make termly contact to market current offering	Ongoing; quarterly mailout	Increase in bookings	MHO; MAA; Volunteers	Staff; Central Administration; Promotion (though free channels of advertising to be sought); Admissions (cost of additional Staff hours offset by small charge for school visits); Supplies for small items to add to outreach boxes
	Develop upon recent school visits partnership with Erasmus Darwin House	Ongoing	Increase in joint bookings	MHO	
	Recruit volunteer(s) to assist with development, marketing and delivery of museum education.	Ongoing	Growth in volunteering numbers, note in LCC report	MHO; Volunteers	
	Extend the museum's education provision to also cover Key Stages 3 and 4.	March 2021	Resources produced, statistics on take-up reported	MHO; Volunteers	

d) To increase the number of group visits bookings	Produce a range of group-specific literature advertising tours and talks Targeted postal and e-campaign to relevant interest groups locally and in Midlands)	October 2018 Annual	Increase in group bookings Increase in group bookings	MHO; MAA MHO; MA; Volunteers	Staff; Central Administration; Promotion (for designing and printing leaflets, free channels of advertising to be sought); Admissions (cost of additional Staff hours for tours offset by admission charge).
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iii) To increase access to the Museum and collections

Objective	How to be achieved	Achieve by	Performance indicator	Resource Plan	
				Workforce: who completes* Time: for 2015/16 priorities (approx. working days)	Financial: relevant budgets
a) To improve awareness of, and access to, all parts of the collection	Programme regularly changing items within permanent displays and small exhibitions or displays to provide access to reserve collections, with one display every summer. Full database of collections made available to public on website and on terminal in house. Research possibilities of digital archive interactives (for e.g. manuscript collection), research potential funding available	Ongoing; display reported annually October 2018 October 2018	Note in LCC report New facility available, web visitor statistics Report presented to committee	MHO; Volunteers MHO; LCC MHO; Consultants	Staff; Central Administration (new website contracts); Supplies (materials for in-house production of display material, or purchase of inexpensive display items);
b) To update interpretive materials and displays	Improve tactile and sensory interpretation provision, beginning with suggestions from 2014 young people report: adjusting existing sound interactives and improving calligraphy table Develop low-tech interactive displays, and improving dressing up provision in response to feedback Improve interpretation of Museum libraries and bookcases, re-display significant books on open stands. Assess use of available public space and allocation of rooms in building, research potential funding for large scale redisplay of rooms.	Ongoing; to be considered within re-display project Ongoing Ongoing October 2018	Updated displays, note in LCC report New resources, feedback New resources, feedback Report presented to committee	MHO; Consultants MHO; Attendants MHO; Volunteers; MHO; Consultants	Staff; Supplies; Central Administration; Promotion (cost of printing, family trail and labels to be produced in-house), External grant aid funding to be sought for any more ambitious interpretation materials that cannot be produced in-house.

c) To improve facilities for researchers and publicise provision more widely	Continue improvements to Wood Library to create a dedicated and user-friendly space for research visitors. Evaluate user experience.	Ongoing	Improved facilities, feedback	MHO; Volunteers; Consultants	Staff; Central Administration; Supplies. Improvements to library also depend on
	Raise academic profile of Museum through forging and maintaining links with universities, research institutes and libraries	Ongoing	Increased number of research visits	MHO	developing storage for collection (see iii.a) for which external funding may be sought.
	Establish regular volunteer-led library sessions and publicise with local interest groups.	October 2019	Feedback, noted in council report	MHO; Volunteers	
d) To assess and seek alternative solutions to the physical limitations of the building	To implement actions arising from 2017 Access Audit	Ongoing plan produced by October 2018	Improved facilities, noted in LCC report	MHO; LCC	Staff; Central Administration; additional funding to be identified and sought.
	Research possible solutions for information at pavement level.	October 2018	Report presented to committee	MHO; Consultants	
	Assess how the building limits our services through active consultation with specialist non-user groups, and/or obtaining an external access audit of the building	October 2018	Report from Focus Group or Access Audit	MHO; Consultants	
	Liaise with English Heritage over new approaches to adapting listed building access, and research potential funding streams.	October 2018	Report presented to committee	MHO; Consultants	

iv) To care for the Museum building and collection

Objective	How to be achieved	Achieve by	Performance indicator	Resource Plan	
				Workforce: who completes* Time: for 2015/16 priorities (approx. working days)	Financial: relevant budgets
a) To improve the storage and care of the collection	Carry out a full storage audit and improve and reorganise current storage use within the building.	October 2019	Note in LCC report, improvements planned	MHO; Volunteers	Staff; Supplies; Blum collection care fund; Johnson Society fundraising.
	Prioritise collection care tasks within SJBM work plans, carrying out tasks and projects as specified in the SJBM Collection Care Plan (update due in 2019)	Ongoing	Improved access to collections. Note in report. Updated Plan	MHO; LCC Volunteers	
	Carry out a full collections review and plan rationalisation	October 2019	Note in LCC report	MHO; Volunteers	
	Identify key items requiring conservation and work with Johnson Society (Friends fund) to raise funding for work.	Ongoing	Note in LCC report	MHO; Volunteers	

b) To improve the documentation of the collection	Complete actions identified in the SJBM Documentation Plan	March 2019	Plan produced, note in report	MHO	Staff; Central Administration (minor administrative costs); Promotion for voluntary positions (though free channels of advertising to be sought).
	Maintain numbers of volunteers who regularly work on both the collection database and paper records	Ongoing	Full volunteer rota, report	MHO	
	Improve records and add images to collection database.	Ongoing	Note in LCC report	Volunteers	
	To produce an overall Collection Management Plan & Framework	March 2019	Plan produced, note in report	MHO	
	Clear backlog of old accession and provenance information and enter into database.	Ongoing, completed March 2019	Note in LCC report	Volunteers	
f) To ensure the ongoing protection of the collection against disaster and damage	Ensure that all staff are fully trained in the Museum Emergency plan procedure	Ongoing; annual testing	Periodical trials, note in report	MHO; LCC	Staff (staff training to be conducted in-house);
	Fully analyse environmental monitoring data and produce report with recommendations	March 2019	New equipment, note in report	MHO; LCC	Supplies; LCC R&R budget could be used for e.g. CCTV and heating improvements
	Research further improvements into heating system controls to address specific issues raised in environmental monitoring report	October 2018	Report presented	MHO; Volunteers	
g) To ensure the continual maintenance and sustainability of the Birthplace building	Conduct regular visual checks of the building and report any issues promptly	Ongoing, fortnightly checks	Note in council report	MHO	Staff; Repair & maintenance; LCC R&R budget for larger works.
	Implement improvements outlined in the SJBM Environmental Action Plan, with replacement of lighting for LED and low energy alternatives as priority	Ongoing, lighting by 2021	Works completed, note in LCC report	MHO; Volunteers	
	Programme all works recommended in the 2016 quinquennial inspection	Ongoing	Works completed, note in LCC report	MHO; LCC	

* Key to abbreviations used in tables:

LCC Lichfield City Council (where LCC appears in the 'who completes' column, this refers to support and decision making from LCC's Town Clerk and/or Deputy Town Clerk)

M&HO Museums & Heritage Officer

MAA Museum Administration Assistant

SJBM Samuel Johnson Birthplace Museum

BIRTHPLACE ADVISORY COMMITTEE: APPENDIX 2
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**THE SAMUEL JOHNSON BIRTHPLACE MUSEUM
ENVIRONMENTAL POLICY STATEMENT**

Date of acceptance by governing body: XX April 2018

Date of review: March 2021

The Samuel Johnson Birthplace Museum (SJBm), part of Lichfield City Council (LCC), is committed to reducing the impact of its activities on the environment. SJBm has taken part in the West Midlands 'Green Museums' project since 2012 and improvements have included a new efficient boiler, improved insulation and low energy bulbs. SJBm has pledged to reduce energy use where possible within our Grade I listed historic building. In 2018, SJBm has pledged to reduce the use of single-use plastics on site, by reviewing the items we purchase and taking measures such as encouraging members of our regular groups to bring their own cups to events.

We will achieve our aims by:

- Considering sustainability in our forward planning and developments (*in line with LCC's Key Objective 3. "to promote sustainable development to meet the needs of present and future generations"*)
- Continually monitoring and identifying ways we can reduce our energy use
- Recycling, donating or re-purposing as much of our waste as possible
- Making ethical consumer choices and shopping locally where appropriate
- Promoting the availability of public transport in our advertising material
- Sharing information with our users about our green projects and achievements
- Training new and existing staff and volunteers to support and share these aims

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BIRTHPLACE ADVISORY COMMITTEE: APPENDIX 3

DE-ACCESSIONING ITEMS OF FURNITURE

The SJBM Collections Development Policy (2015) includes guidelines for the disposal of items from the collection (see relevant sections 5, 6 and 16 included at the end of this report). Included within the current planning cycle is the disposal of "items of furniture held in storage long-term in poor condition, with no association to Johnson and where the condition of the items presents a risk to other collections and the building."

The Museums and Heritage Officer has identified four items of furniture within this category. Should disposal be approved, professional standards are to be followed (see section 16 below), with gifting to another Museum as the primary method of removal.

Tavern Chair (2000.89)



Gift from Ind Cooper Ltd, 1964

Supposedly used by Johnson at the Three Crowns Inn, this chair was in poor condition on arrival. It was inspected in 1964 by Mr. John Lowe, Director of Birmingham Museum and Art Gallery, and declared too late for Johnson (c.1790). It has never been on display and has been stored in the basement boiler room. In 2017 the chair was appraised by Richard Winterton, who confirmed the dating as late 1780 - 1810 and valued it at £150 in its present condition. Restoration of the chair has been quoted at £500. As it is not an item used by Johnson, this chair does not meet the collecting aims of the Museum. This could be offered by transfer to other Museums, particularly those with an interest

in social and brewing history.

Red Leather Armchair (2001.538)



Transfer from Lichfield Free Library and Museum, 1962.

This armchair is said to have belonged to Thomas Harwood, Lichfield historian. It has been stored in the Guildhall cells and the leather is in poor condition, but generally it is considered to be a fine example. In 2018 the chair was appraised by Richard Winterton, who has dated it as Regency (c.1810-1820) and valued it at £150 in its present condition. Should an alternative use for the chair (e.g. at the Guildhall) be desirable, a furniture restorer has quoted an approximate cost of £580 for the chair to be reupholstered.

Armchair & Prayer Stool (2000.90.1 & 2000.90.2)

Gift from local family, 1997

This late 17th century chair and prayer stool were accepted by the then curator with the intention of using them within the Museum's tableau scenes (as a prop 'Mrs Johnson's Chair'), with the understanding that they would need to be reupholstered to make them fit the

time period of the house. This work was not carried out, and both items have been in storage since. The chair was moved into the basement tableau in 2016 and temporarily covered with a cloth. It is not intended to dispose of the chair from the building, but de-accessioning this item from the collection would enable more flexible use in future displays – as a handling item which members of the public can sit on, for example. A furniture restorer has quoted an approximate cost of £230 for the chair to be reupholstered. The prayer stool does not fit the collecting aims of the Museum, and could be offered to other museums.



COLLECTIONS DEVELOPMENT POLICY
SAMUEL JOHNSON BIRTHPLACE MUSEUM, LICHFIELD
(Adopted by LCC 20 April 2015)

Sections 5, 6 and 16 only reproduced below:

5. Themes and priorities for rationalisation and disposal

- 5.1 The museum recognises that the principles on which priorities for rationalisation and disposal are determined will be through a formal review process that identifies which collections are included and excluded from the review. The outcome of review and any subsequent rationalisation will not reduce the quality or significance of the collection and will result in a more useable, well managed collection.
- 5.2 The procedures used will meet professional standards. The process will be documented, open and transparent. There will be clear communication with key stakeholders about the outcomes and the process.

A small amount of active disposal is included in the current planning cycle:

- Minor ephemeral accessioned archived items including: photocopies of articles available elsewhere in collection; correspondence about collections better placed in object history files; modern newspaper book reviews.
- Modern reference books unrelated to the collection, where copies are readily available to access elsewhere in the city
- Items of furniture held in storage long-term in poor condition, with no association to Johnson and where the condition of the items presents a risk to other collections and the building.

6 Legal and ethical framework for acquisition and disposal of items

- 6.1 The museum recognises its responsibility to work within the parameters of the Museum Association (MA) Code of Ethics when considering acquisition and disposal.

16 Disposal procedures

- 16.1 All disposals will be undertaken with reference to the SPECTRUM Primary Procedures on disposal.
- 16.2 The governing body will confirm that it is legally free to dispose of an item. Agreements on disposal made with donors will also be taken into account.
- 16.3 When disposal of a museum object is being considered, the museum will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.
- 16.4 When disposal is motivated by curatorial reasons the procedures outlined below will be followed and the method of disposal may be by gift, sale, exchange or as a last resort - destruction.
- 16.5 The decision to dispose of material from the collections will be taken by the governing body only after full consideration of the reasons for disposal. Other factors including public benefit, the implications for the museum's collections and collections held by museums and other organisations collecting the same material or in related fields will be considered. Expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by the museum will also be sought.
- 16.6 A decision to dispose of a specimen or object, whether by gift, exchange, sale or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the responsibility of the governing body of the museum acting on the advice of professional curatorial staff, if any, and not of the curator or manager of the collection acting alone.
- 16.7 Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition.
- 16.8 If the material is not acquired by any Accredited museum to which it was offered as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material normally through a notice on the MA's Find an Object web listing service, an announcement in the Museums Association's Museums Journal or in other specialist publications and websites (if appropriate).
- 16.9 The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited Museums. A period of at least two months will be allowed for an interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, the museum may consider disposing of the material to other interested individuals and organisations giving priority to organisations in the public domain.
- 16.10 Any monies received by the museum governing body from the disposal of items will be applied solely and directly for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from the Arts Council England.
- 16.11 The proceeds of a sale will be allocated so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard. Money must be restricted to the long-term sustainability, use and development of the collection.
- 16.12 Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with SPECTRUM Procedure on deaccession and disposal.

Disposal by exchange

16.13 The museum will not dispose of items by exchange

Disposal by destruction

- 16.14 If it is not possible to dispose of an object through transfer or sale, the governing body may decide to destroy it.
- 16.15 It is acceptable to destroy material of low intrinsic significance (duplicate mass-produced articles or common specimens which lack significant provenance) where no alternative method of disposal can be found.
- 16.16 Destruction is also an acceptable method of disposal in cases where an object is in extremely poor condition, has high associated health and safety risks or is part of an approved destructive testing request identified in an organisation's research policy.
- 16.17 Where necessary, specialist advice will be sought to establish the appropriate method of destruction. Health and safety risk assessments will be carried out by trained staff where required.
- 16.18 The destruction of objects should be witnessed by an appropriate member of the museum workforce. In circumstances where this is not possible, e.g. the destruction of controlled substances, a police certificate should be obtained and kept in the relevant object history file.

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